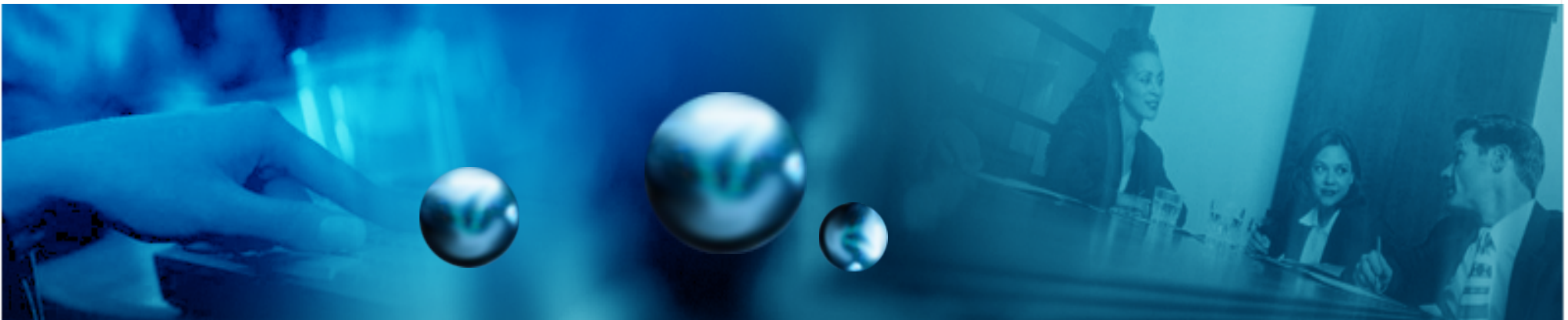


Getting Folks to Accept Change: Organizational Change Management in Delaware



Cindy Bray
Change Management Specialist
Department of Technology & Information
State of Delaware





Project Management



What is a Project?

- **Project**
- A *temporary* endeavor undertaken to create a *unique product, service, or result*.
- **Project Management**
- The application of *knowledge, skills, tools, and techniques* to project activities to meet project requirements.



Project Management Involves

- **Competing demands for scope, time, cost, risk, and quality.**
- **Stakeholders with differing needs and expectations.**
- **Identified requirements.**

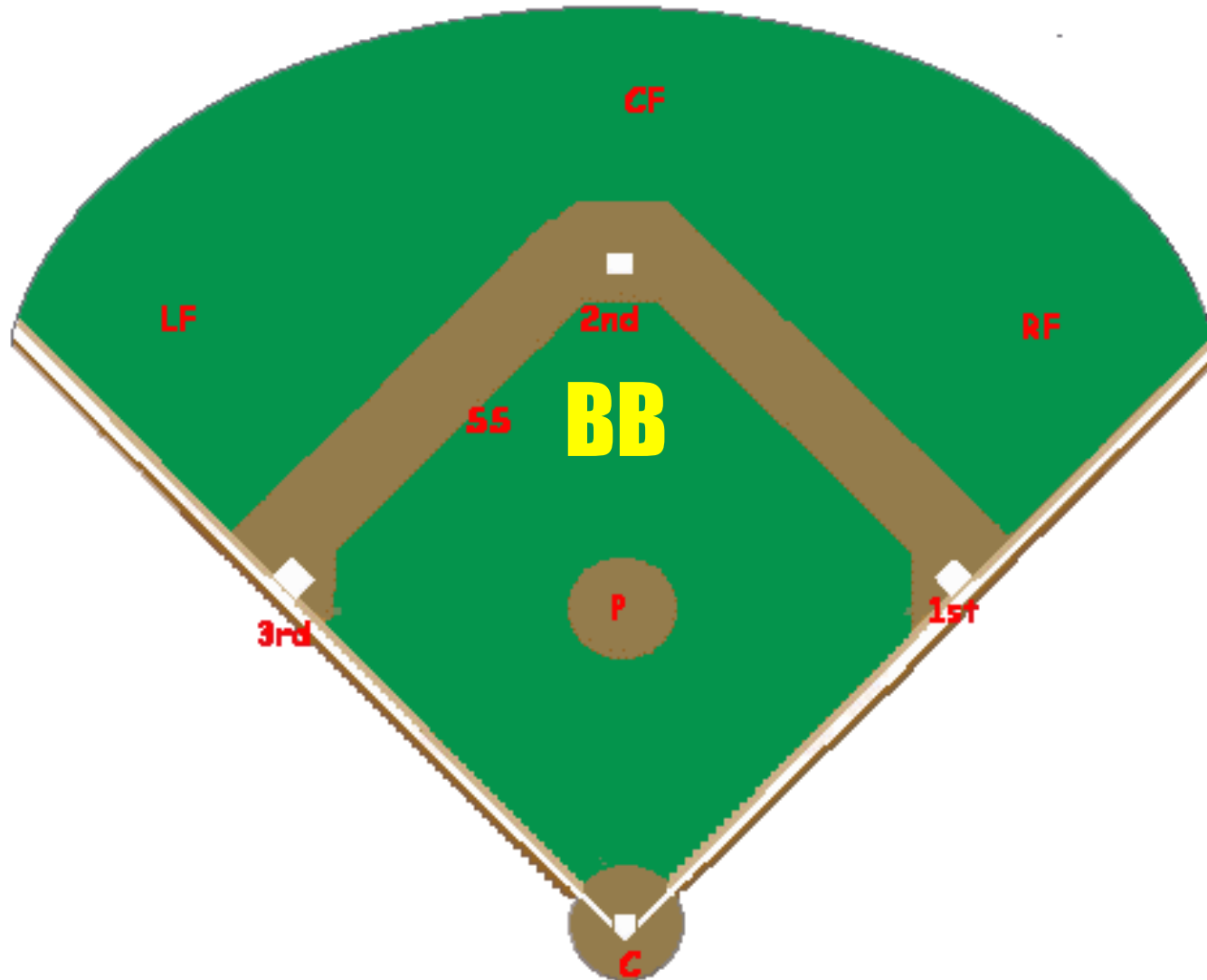


Project Objectives

- **Project Objectives are SMART:**
- *Specific* in terms of scope.
- *Measurable* in terms of time, cost, and quality.
- *Attainable* within time and resources constraints.
- *Realistic* based on resource, risk, and company policies.
- *Tracked* to organizational plans, policies, and procedures.

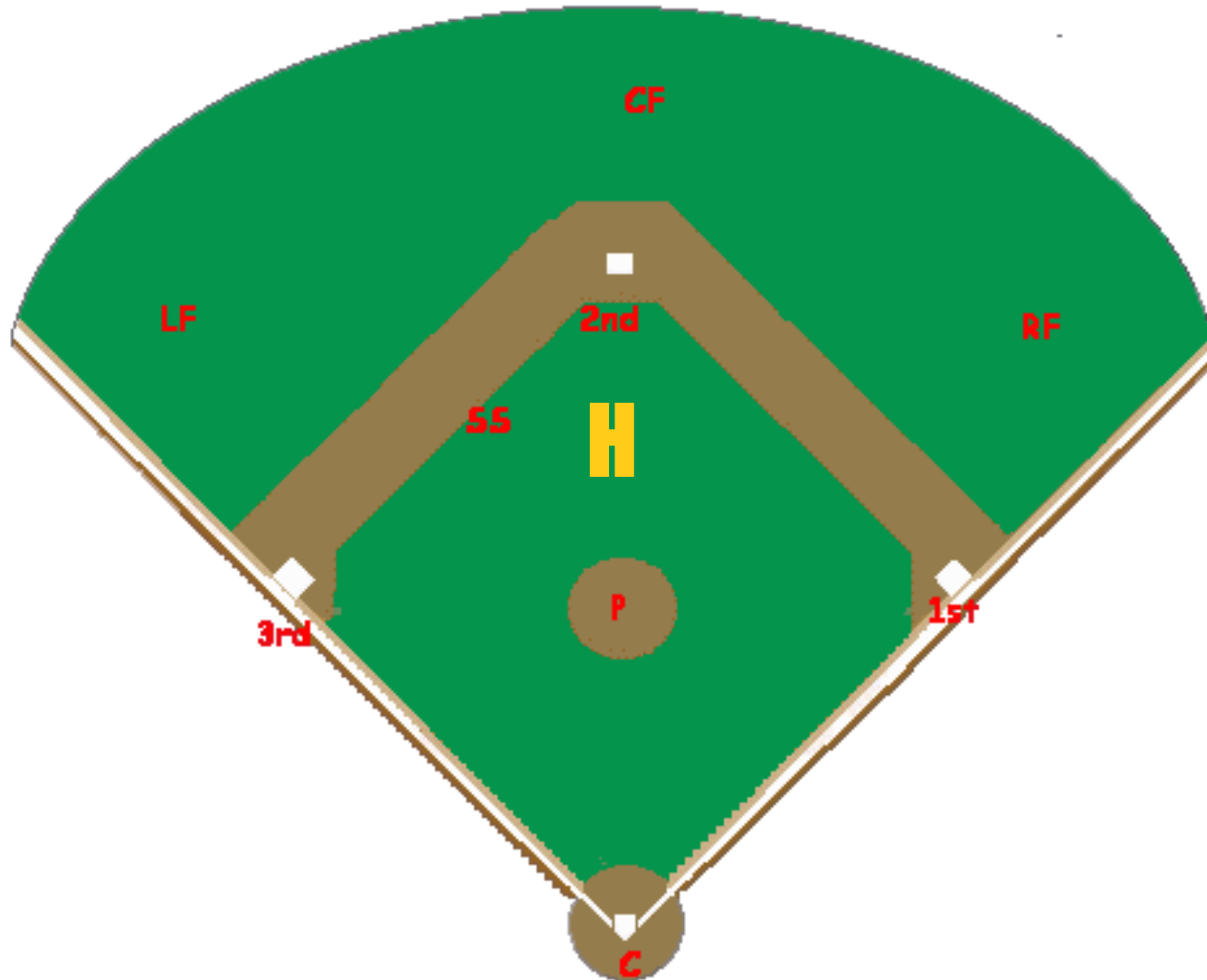


Definitions of Project Success



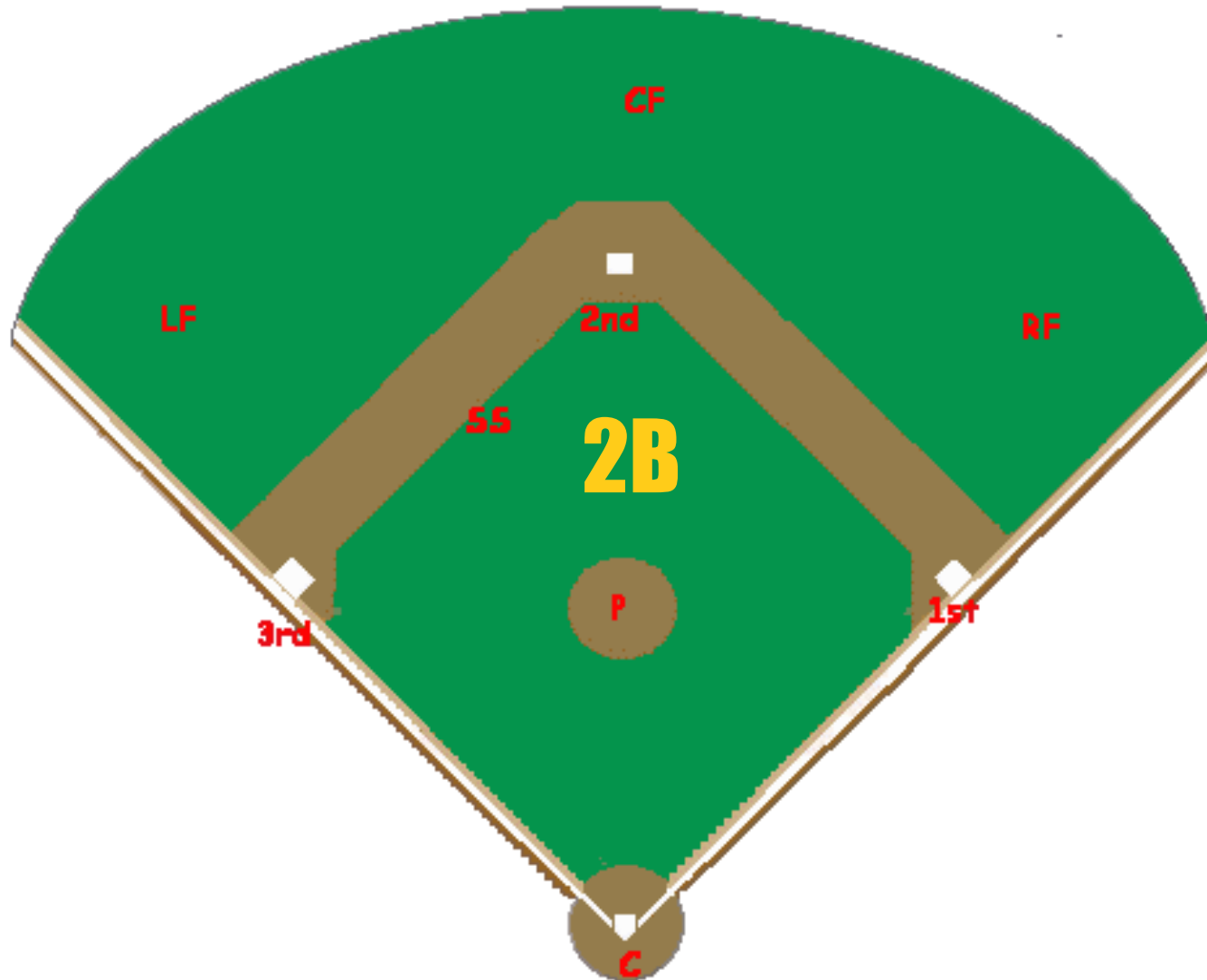


Definitions of Project Success



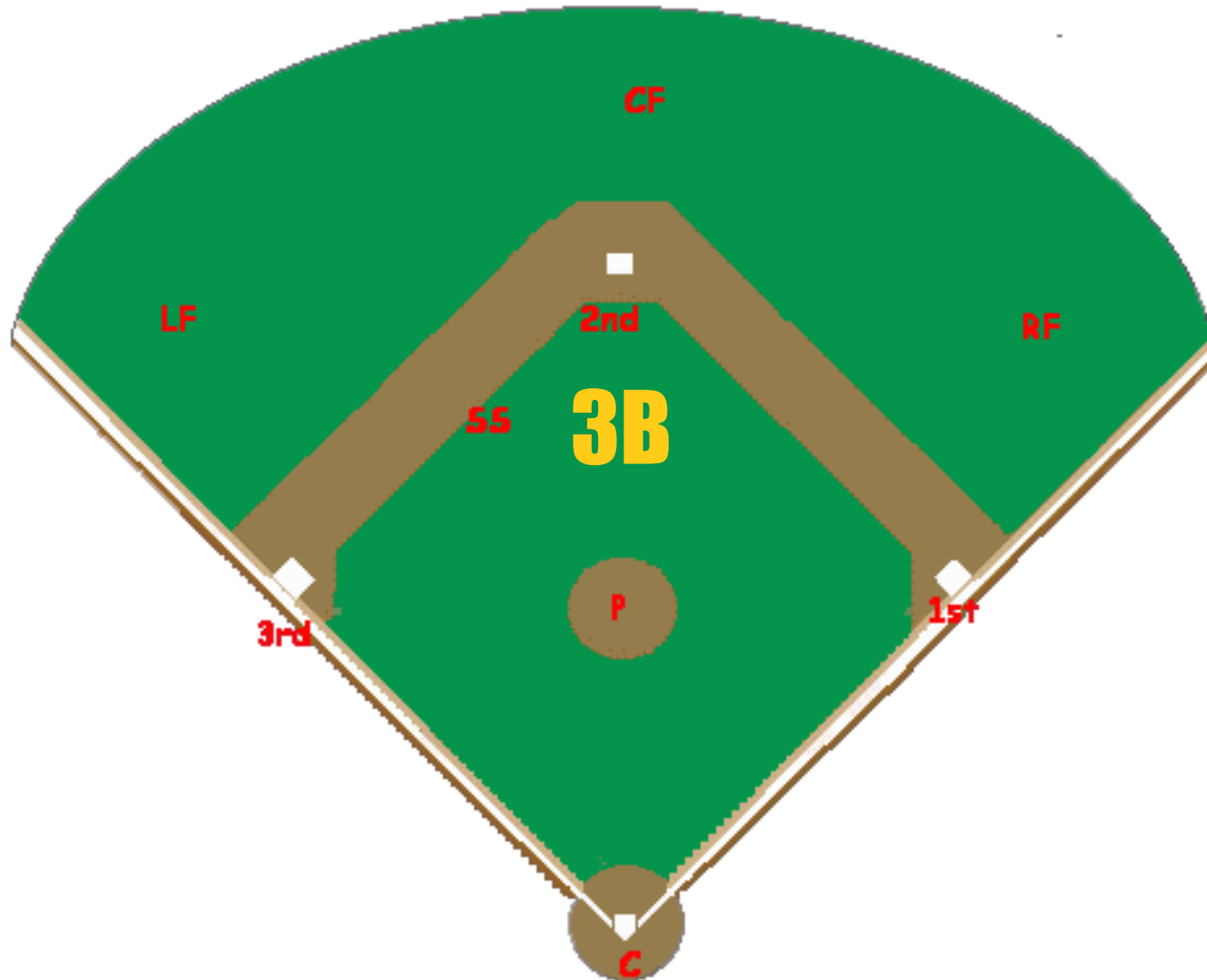


Definitions of Project Success



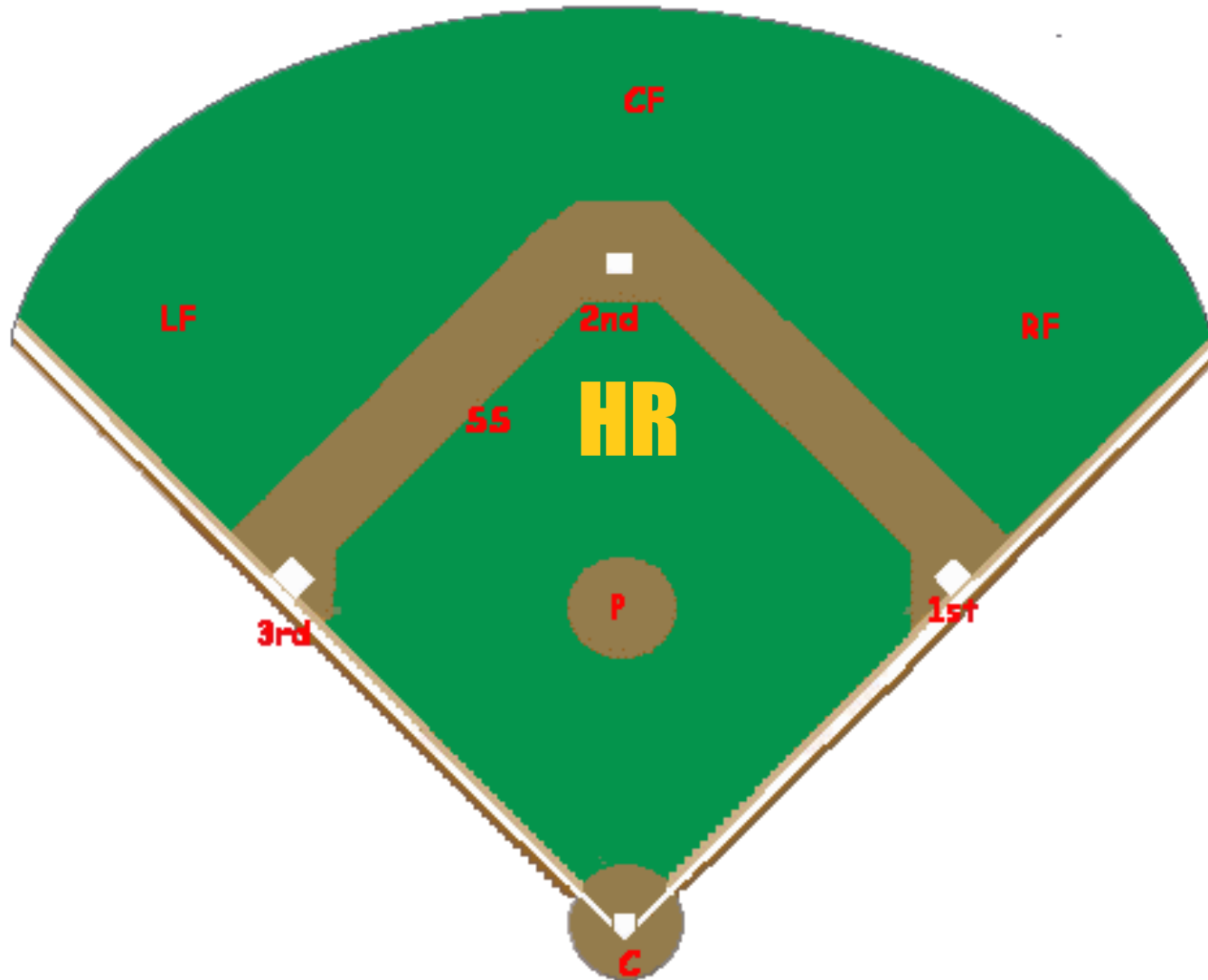


Definitions of Project Success



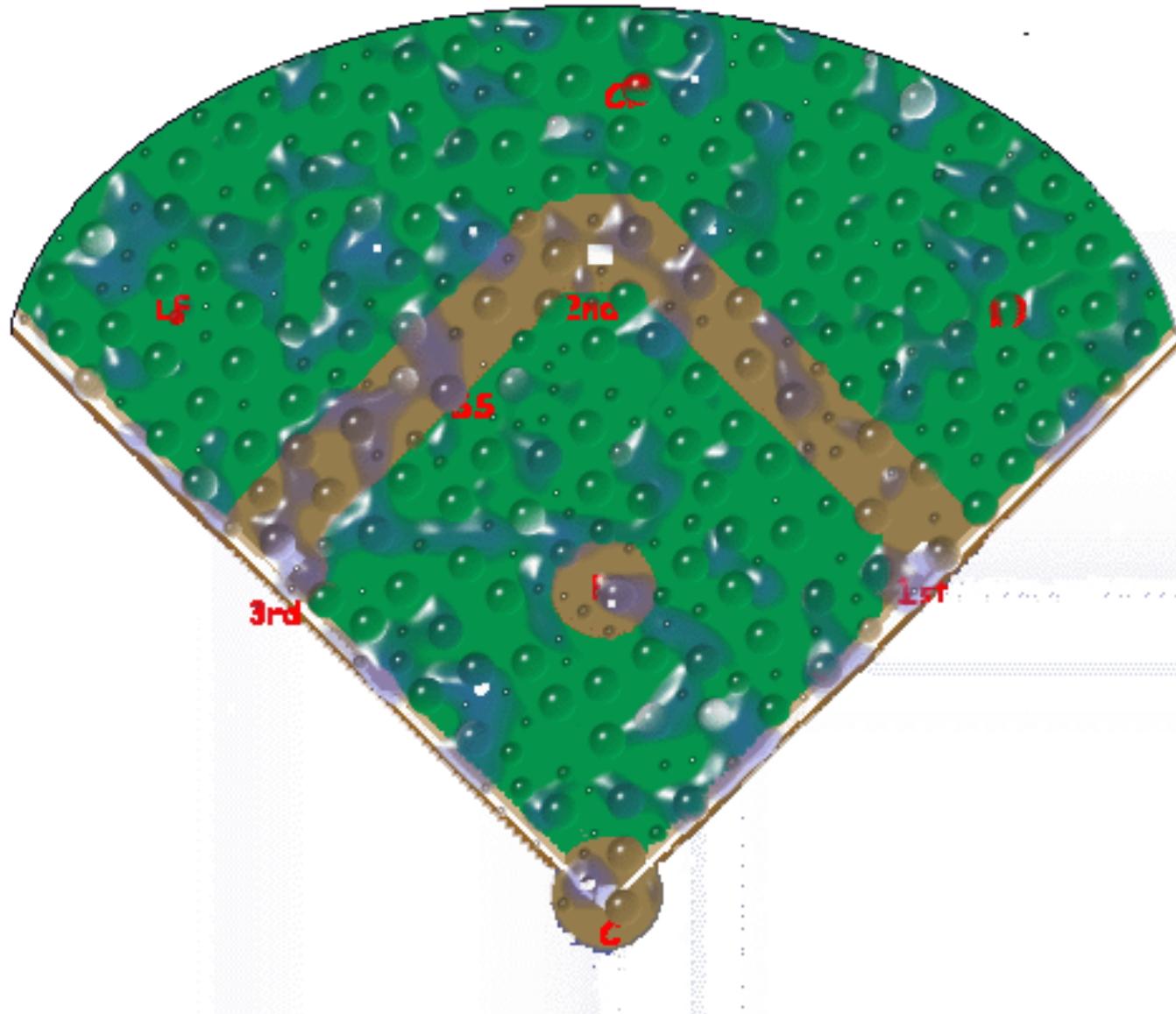


Definitions of Project Success





Definitions of Project Success





Difference Between Project and Organizational Change Management

- **Project Management focus is on specific project activities and deliverables.**
- **Change Management focus is on the impact the project will have on the organization.**

Thus . . .

- **Project Management = the change**
- **Change Management = getting the change accepted**



Organizational Change Management

Organized, systematic application of

- **Knowledge**
- **Tools**
- **Resources of change**

**To provide organizations with a key
process to achieve their business
strategy**



Essential Components of Organizational Change Management

- **Sponsor Management**
- **End-user Communication**
- **Readiness**
- **Training**
- **Coaching**
- **Transition Planning**
- **Resistance Management**



In General

- **Organizational Change Management**
 - Manages change
 - Recognizes that projects deal with people
 - Helps people through the change
 - Provides awareness
 - Ensures readiness



Preparation For Major Change

- **It is important for organizations to understand the**
 - Impacts the implementation will have on their own internal operations
- **And to**
 - Prepare proactively for those impacts



Sources

- **Organizational Change Management is drawn from:**
 - Psychology
 - Sociology
 - Business administration
 - Economics
 - Industrial engineering
 - Systems engineering
 - The study of human and organizational behavior

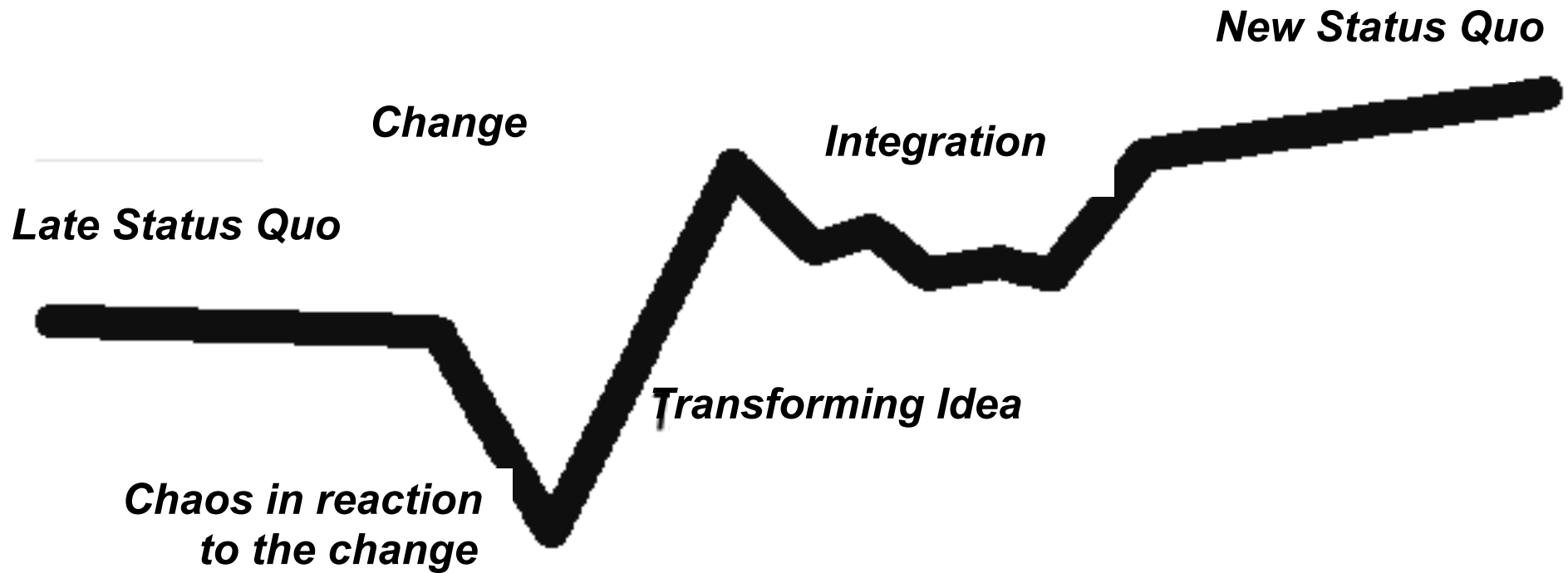


Sources

- **Satir's Change Process Model**
- **Kubler-Ross Stages of Change Model**
- **Kotter's Phases of Change Model**
- **Lewin's Dynamic Stability Model**
- **©Prosci Change Management Model**



Satir's Change Process Model



The impact on group performance of a change during the five stages of the Satir Change Model



Sources

- Satir's Change Process Model
- **Kubler-Ross Stages of Change Model**
- **Kotter's Phases of Change Model**
- **Lewin's Dynamic Stability Model**
- **©Prosci Change Management Model**



Goal of Organizational Change Management

- **Provide the structure and guidance necessary to effectively prepare organizations for the successful acceptance of cultural change necessitated by major project initiatives.**



Project Questions

- **Who ?**
- **What?**
- **When?**
- **Where?**
- **Why?**
- **How?**



Organizational Change Management Questions

- **What's going on?**
- **What's in it for me?**
- **How do I prepare?**
- **How can I participate in the process?**
- **How can I communicate concerns and/or ideas?**
- **What will I do differently tomorrow?**
- **What's happening?**



More Organizational Change Management Questions

- **How do I stay motivated?**
- **What are immediate and long term implications for my job?**
- **How do we make the change?**
- **What needs to be changed?**
- **Why is it being changed?**



Basic Organizational Change Management Steps

- **Provide awareness** of the change that is going to occur.
- **Ensure** there is understanding about **why** the change needs to happen and the **benefits** of that change.
- **Facilitate acceptance** of the change.

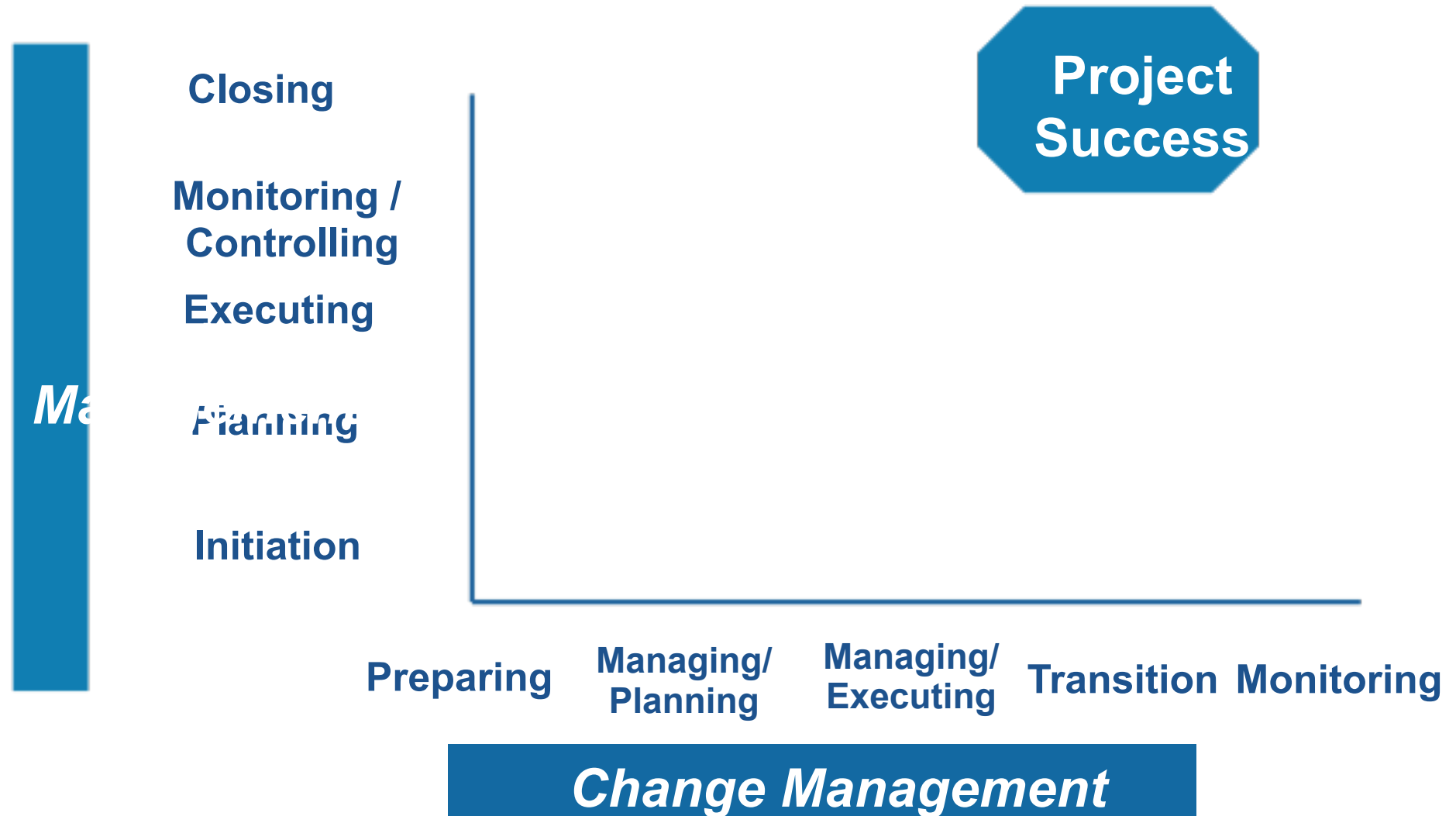


Basic Organizational Change Management Steps

- Act as someone who cares, listens, and responds to individual needs and concerns.
- Manage people and expectations.
- Assist people to use their insights, skills, and sense of values to move forward with organization/team efforts.



Successful Projects





Evolution of Organizational Change Management in Delaware



Delaware's ERP Background

- **State of Delaware**
 - 70 Organizations
 - 35 State Agencies
 - 19 School Districts
 - 16 Charter Schools
- **47,000 Employees**
- **12 Unions Represented**
 - 37 Different Locals





1990's ERP Projects



- **1990's — Various False Starts**
- **July 1999**
 - PeopleSoft Human Resource Version 6.02 implemented
 - Benefits Administration & Payroll — Unsuccessful
 - Rolled back to Mainframe Legacy System



Organizational Change Management Best Practices

Structured change management approach.

Active and visible sponsorship.

**Dedicated resources for project
management and change management.**

Employee participation in change process.

Frequent and open communication.



Elements of Quality

- **What are some elements of quality?**

Department of Technology & Information Organizational Change Management



Repeatable Processes



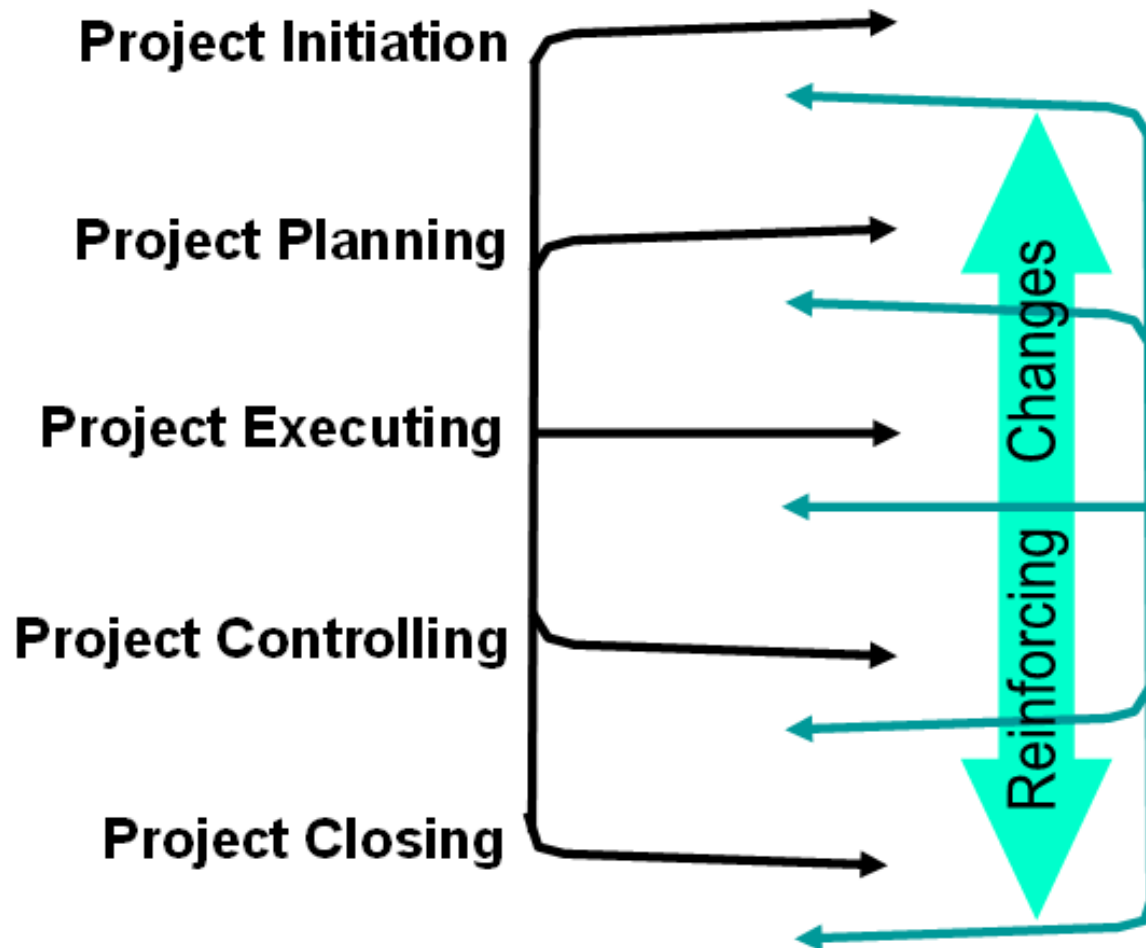
Documentation

- **Processes for the DTI PMO are documented.**
- **DTI-specific training was provided to all Project Managers and Change Management Specialists.**
- **PM and CM processes designed to integrate with one another.**
- **Expectation set by management that these processes will be followed consistently.**



Reinforcing Organizational Change

Project Management



Change Management

Preparing for Change

Managing Change-Planning

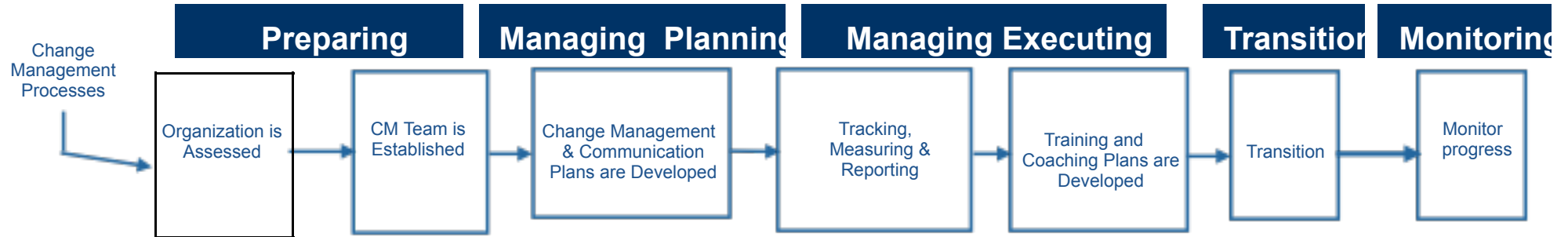
Managing Change-Execute

Transition

Monitoring Change

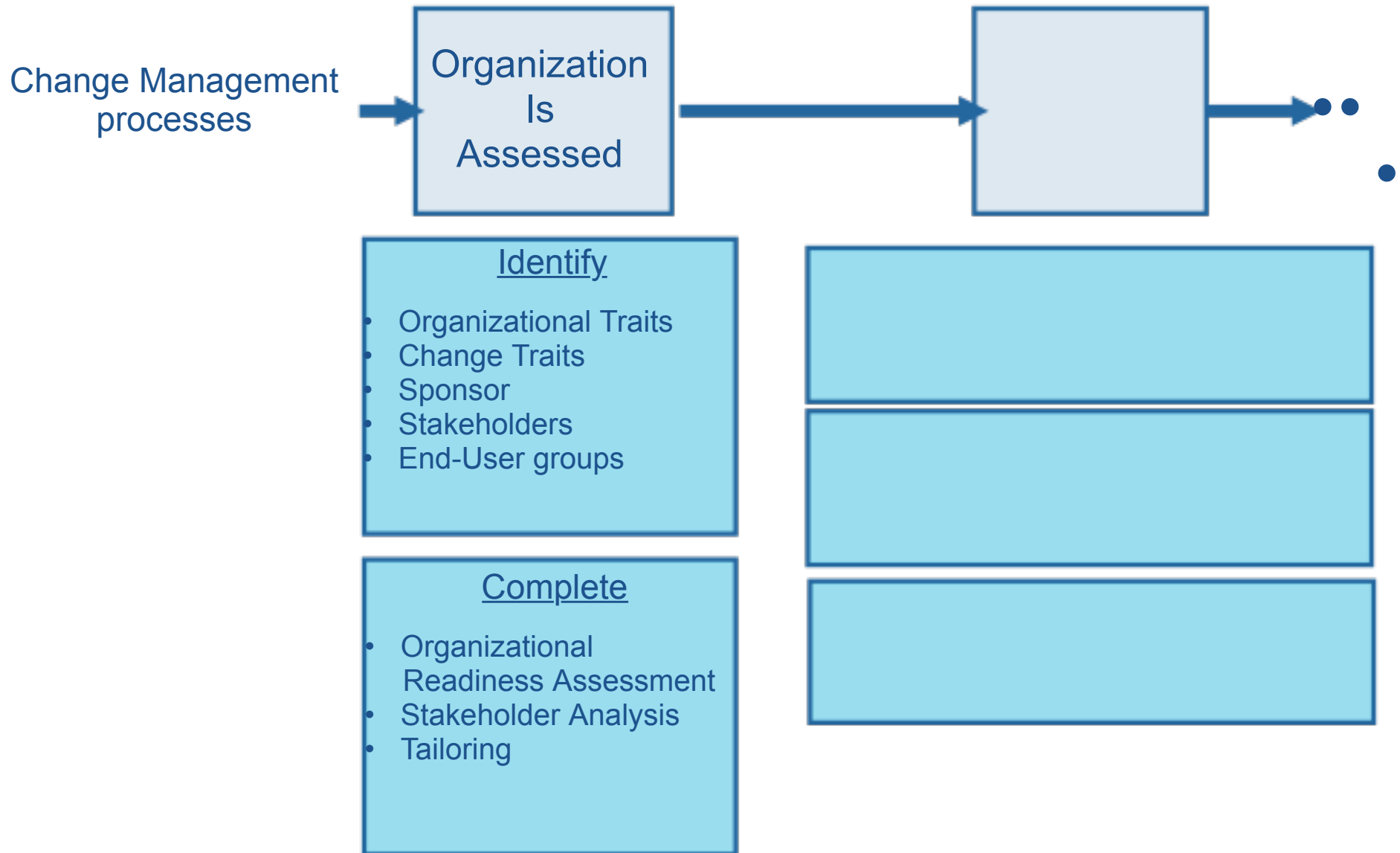


Change Management Processes



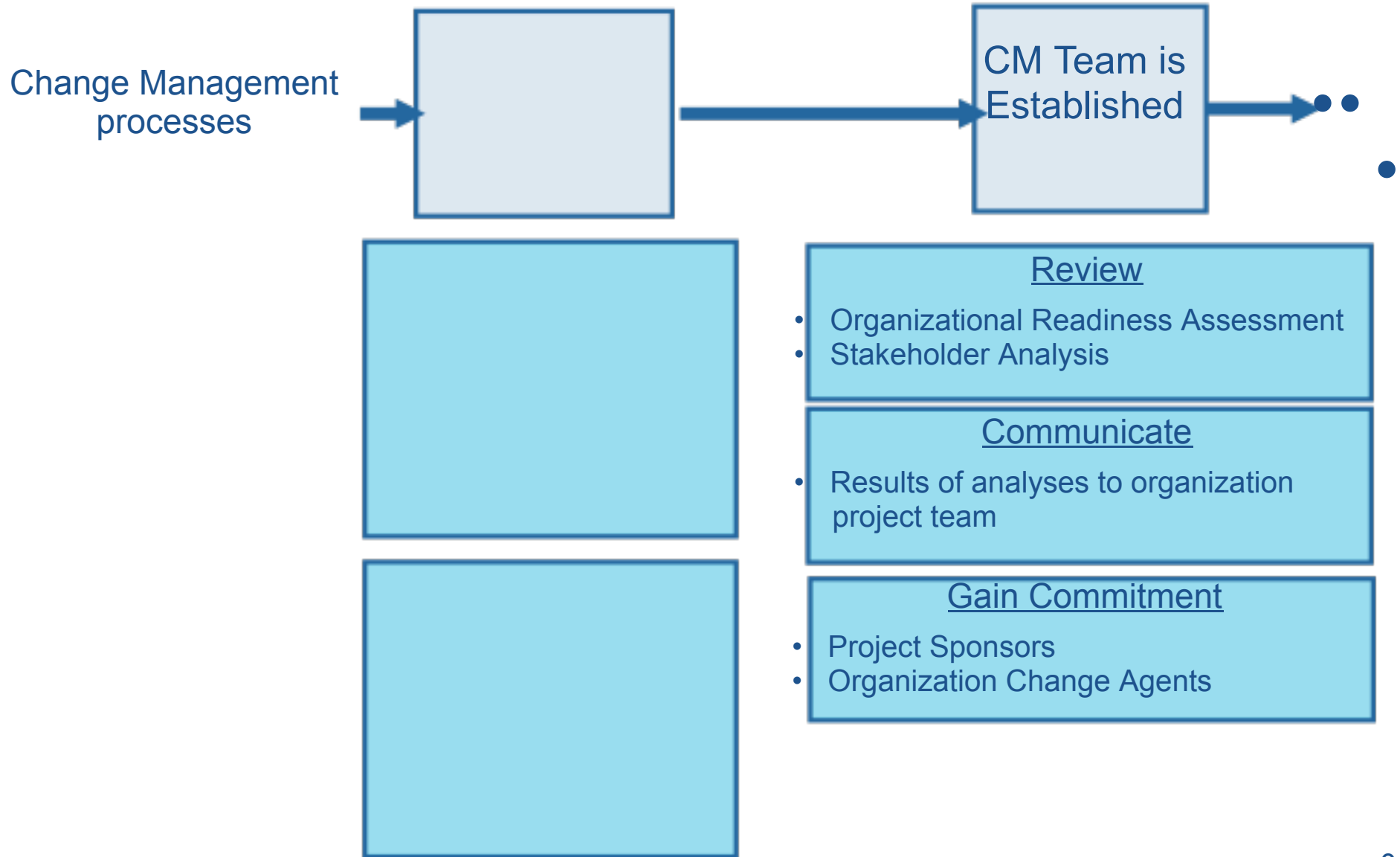


Preparing Process



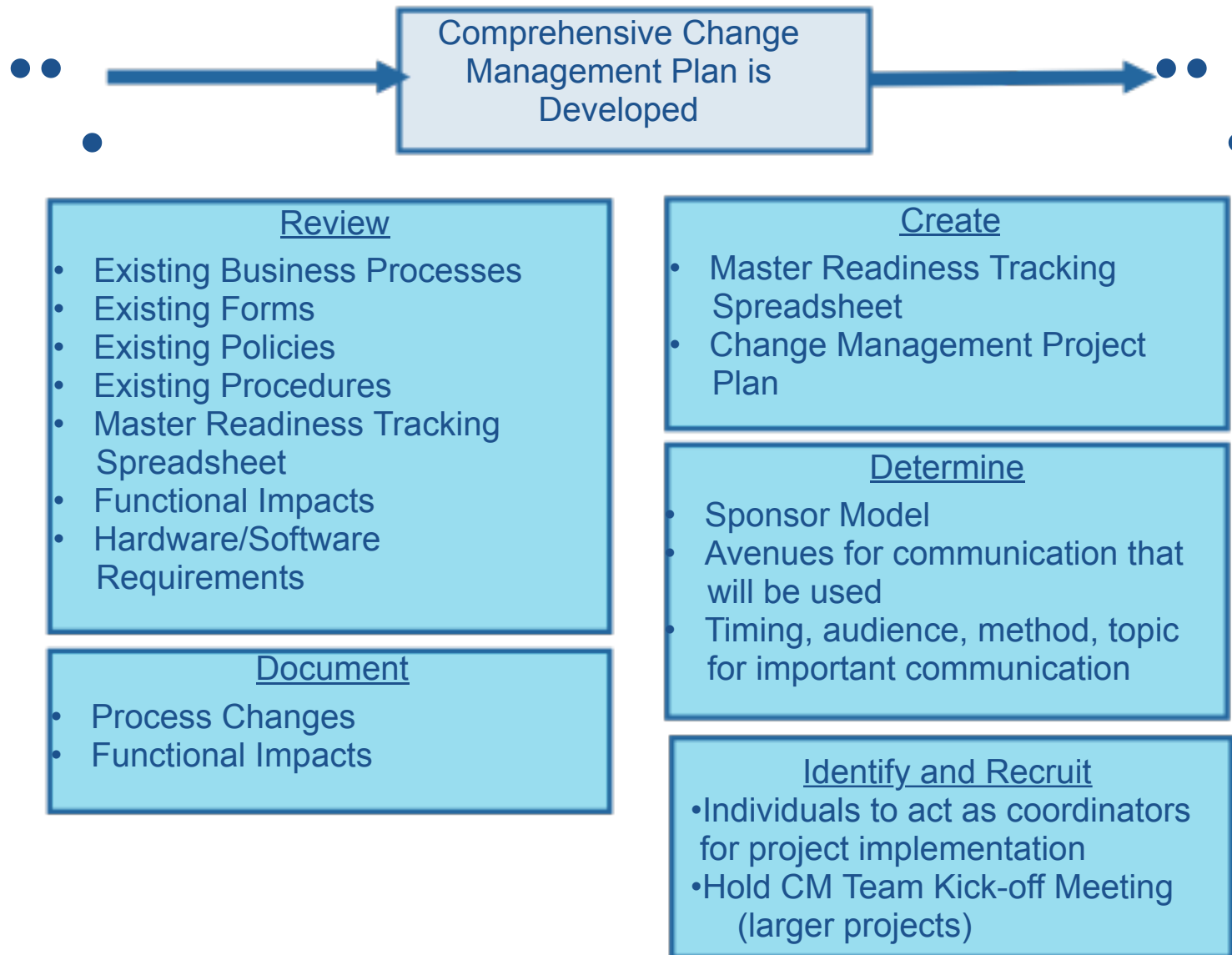


Preparing Process



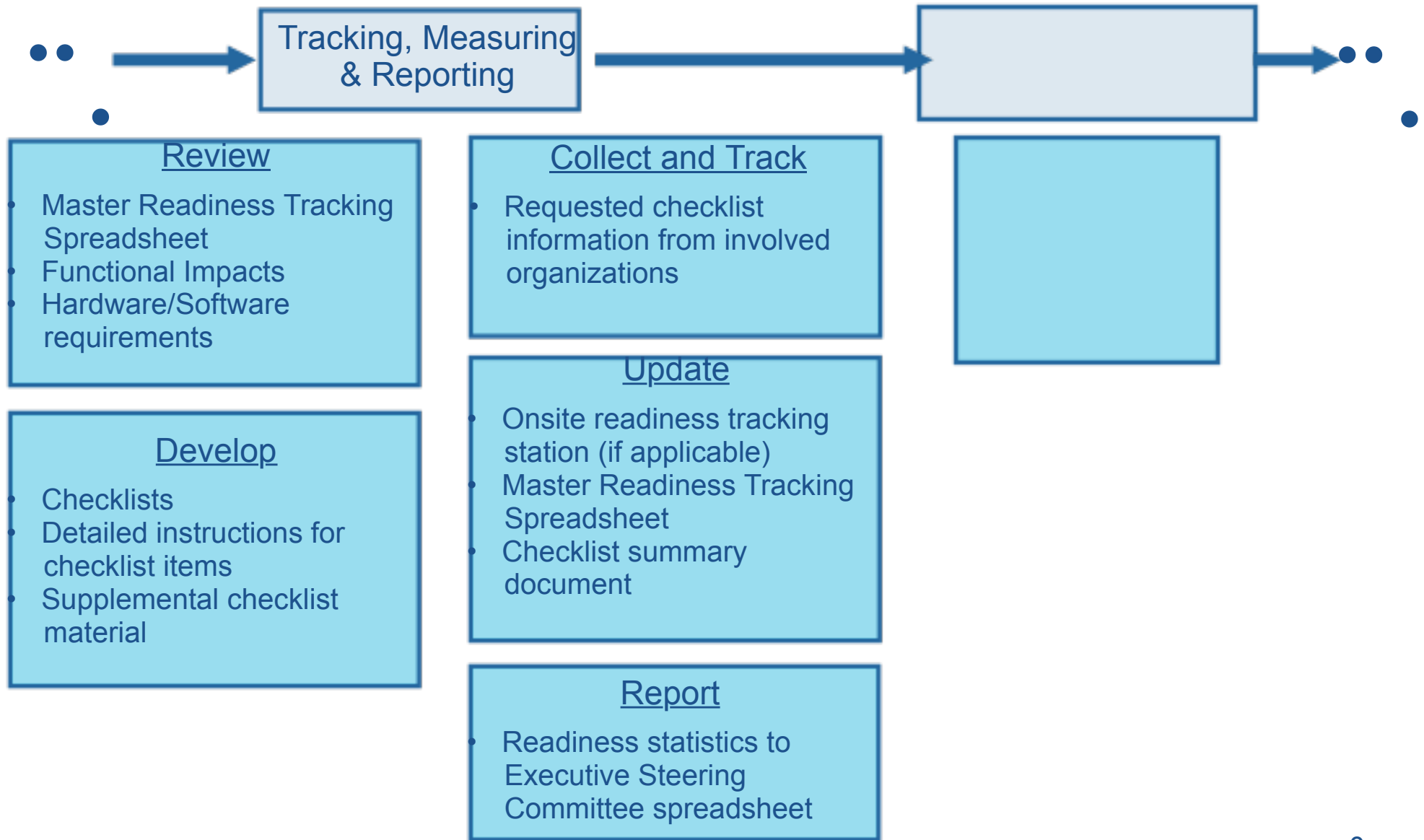


Managing-Planning Process



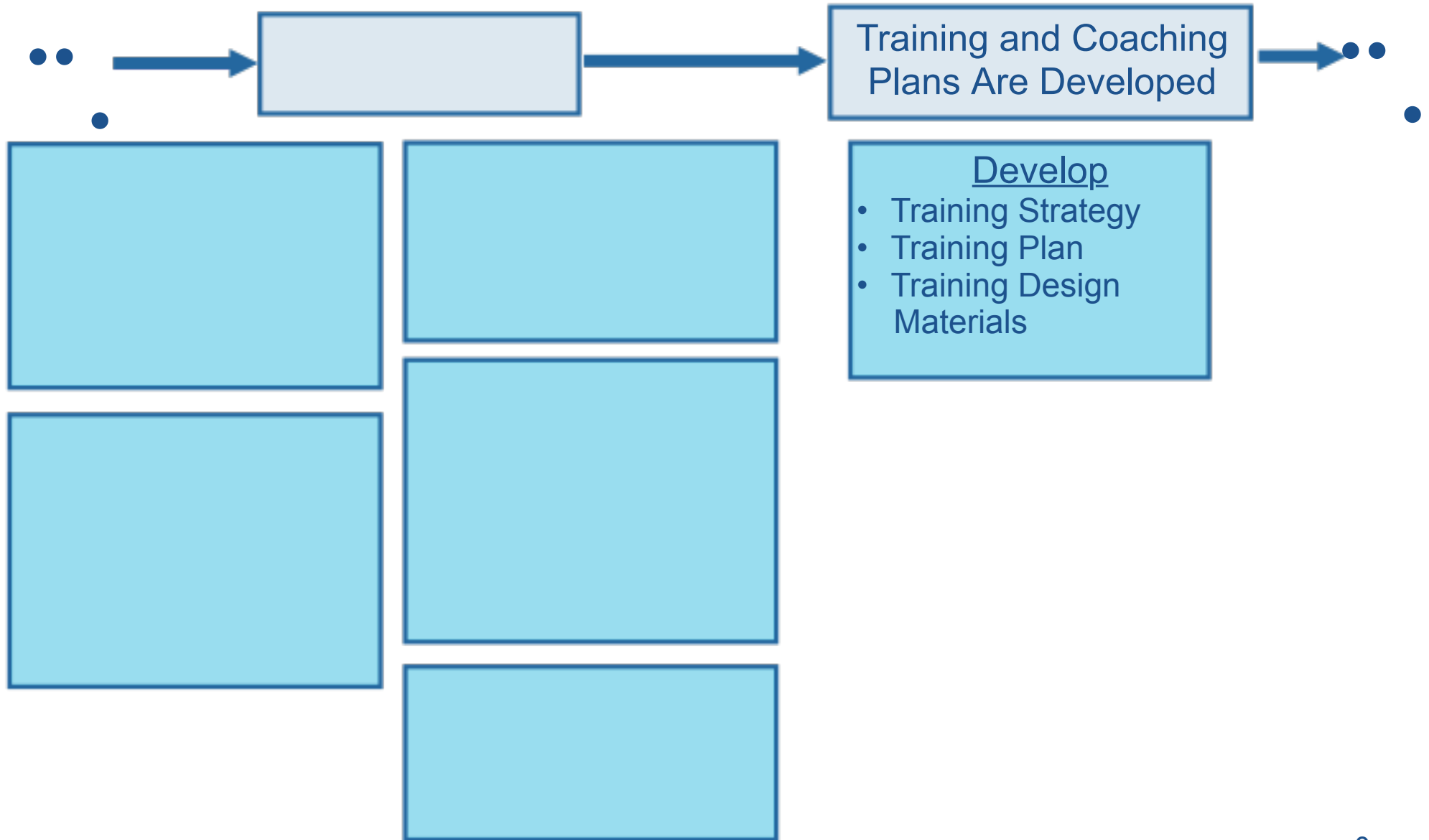


Managing – Executing Process



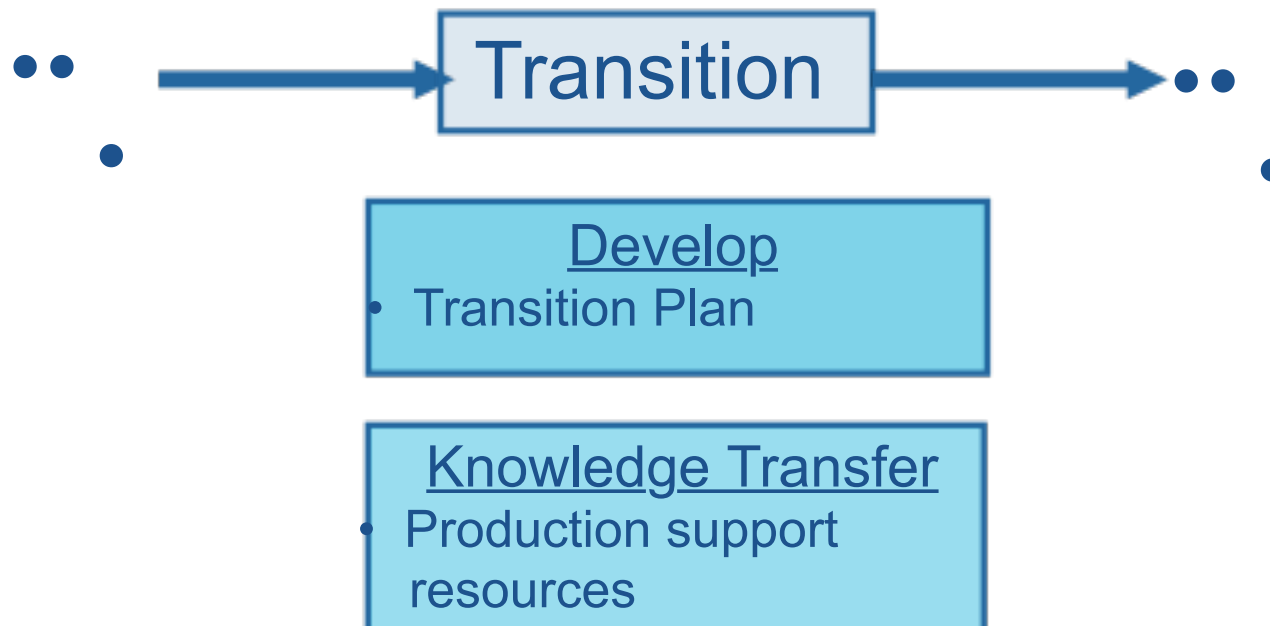


Managing – Executing Process



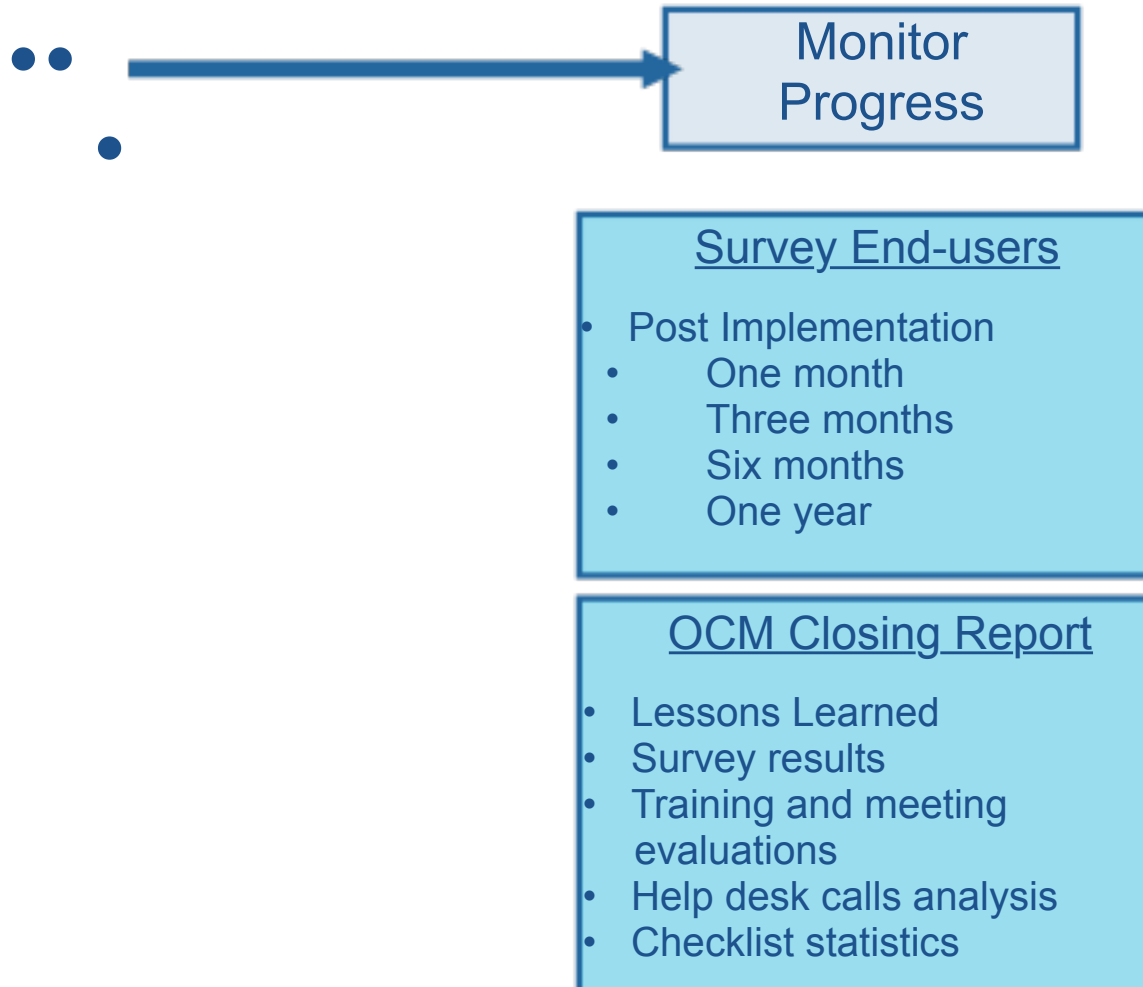


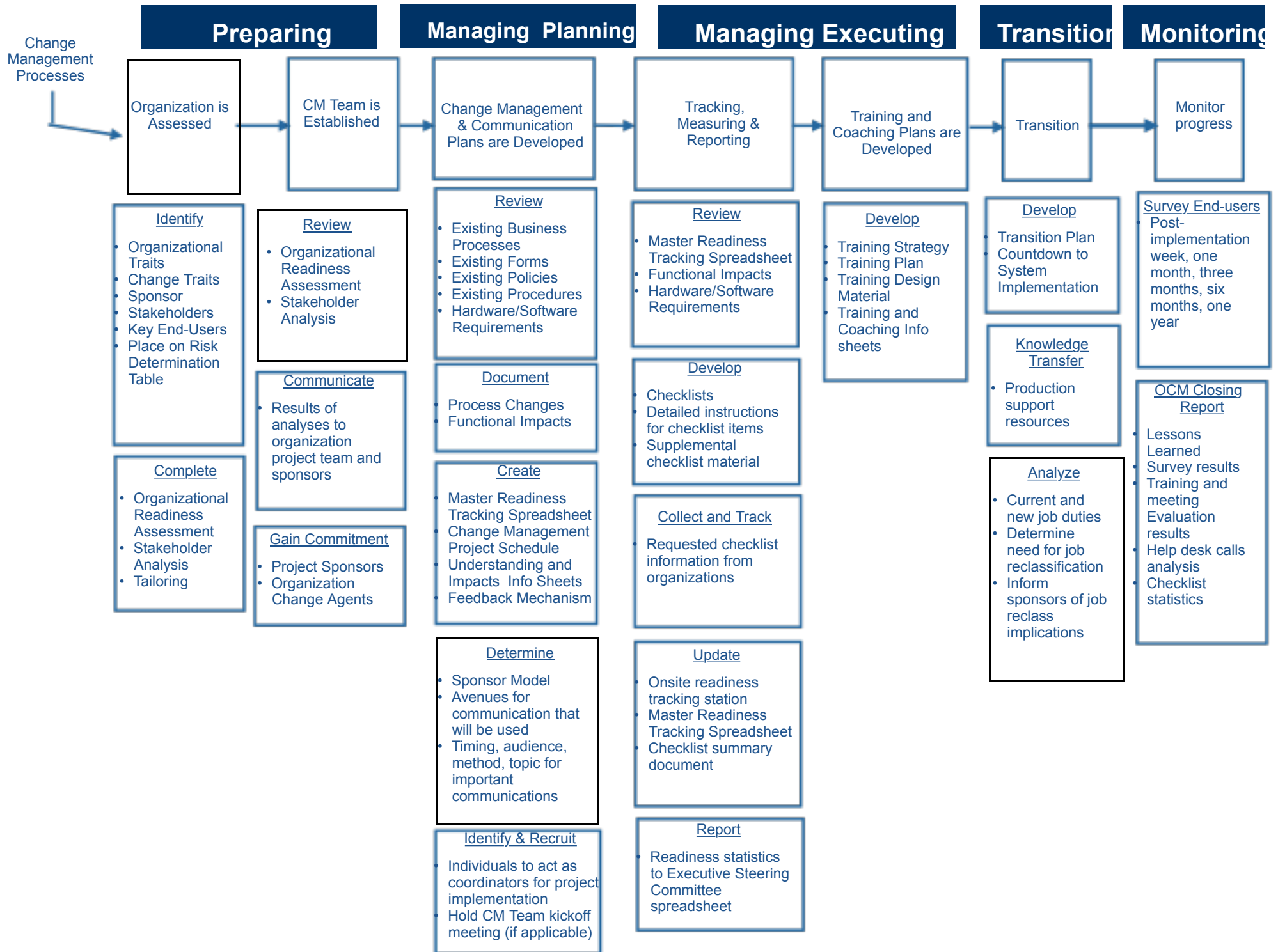
Transition Process





Monitoring Process







Comprehensive Organizational Change Management Plan

- **Uses existing project documentation**
 - Business Case Summary
 - Project Charter
- **Provides**
 - Project overview information
 - Stakeholders and method for specific end-user identification
 - Implementation strategy
 - Definition of change management



Comprehensive Organizational Change Management Plan

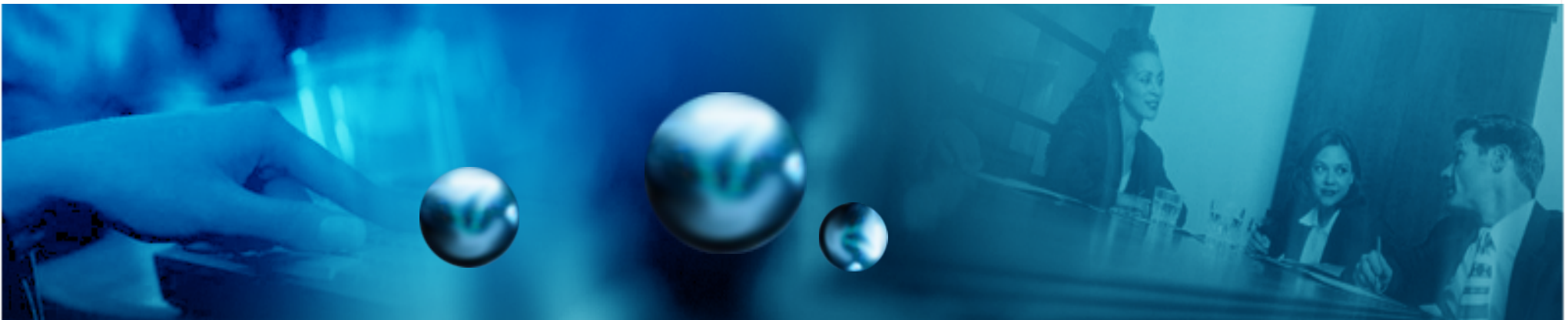
- **Provides**
 - Project goals
 - Project benefits
 - Project deliverables and timelines
 - Roles and responsibilities
 - Results of the organization and project assessment including placement on risk determination table.



Comprehensive Organizational Change Management Plan

- **Provides**
 - Team structure with recommended change management team structure
 - Sponsor Activities
 - Communication Plan
 - Readiness Methodology
 - Training and Coaching Plans
 - Resistance Management Plan
 - Transition Plan
 - Monitoring/Closing Plan

Department of Technology & Information Organizational Change Management



Best Practices



Best Practices

- **Looked internally at DTI**
- **Looked at other state organizations**
- **Looked outside**
 - ©Prosci
 - ASTD
 - Learning Tree
 - Gartner
 - IBM



Specifically Incorporated Items

- **Sponsor Plan**
- **CM Team Structure**
- **Communication Strategy**
- **Transition Plan**
 - **Knowledge Transfer**



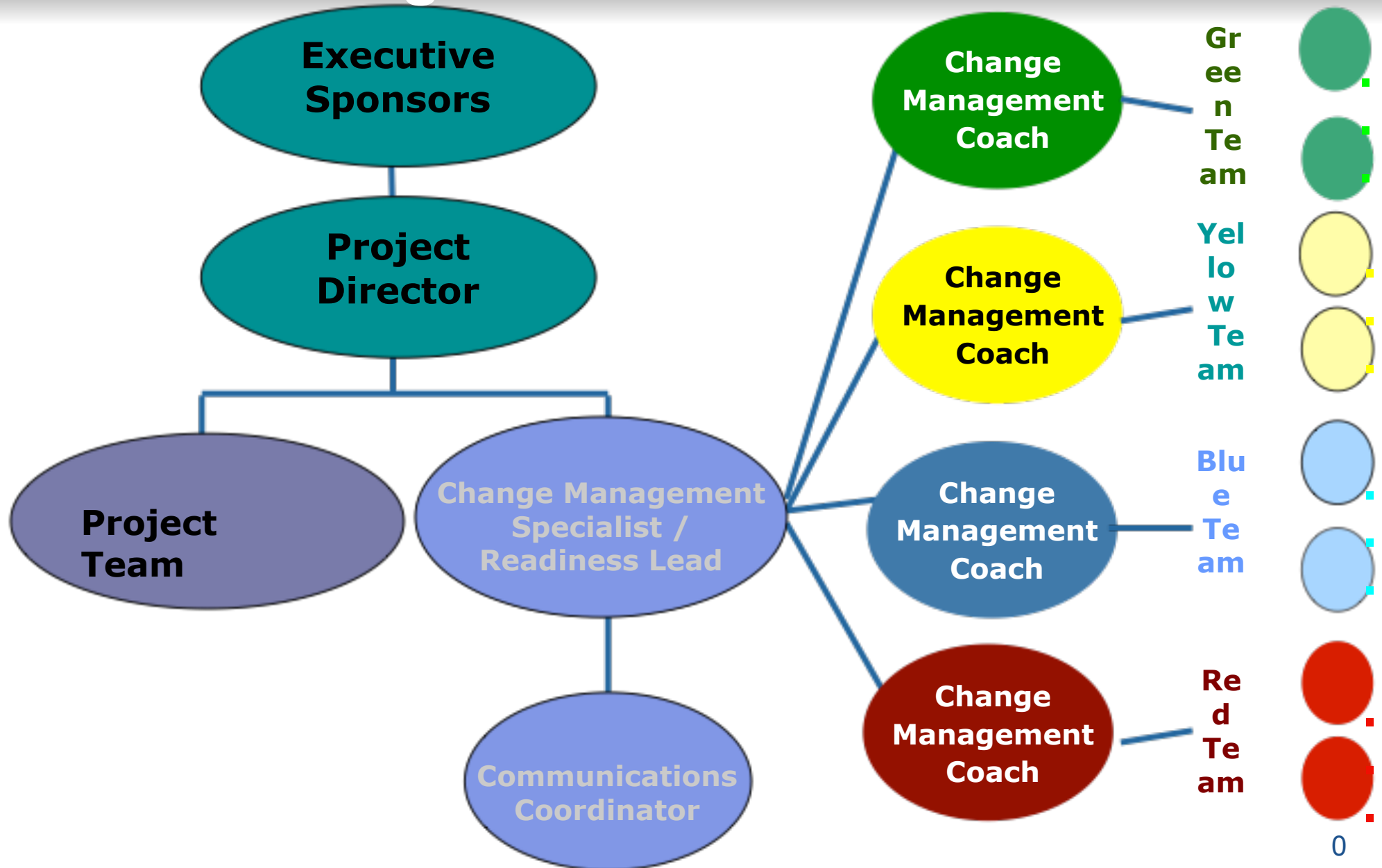
Sponsor Activities

Executive Sponsor Blueprint Sample

Target Group	Activity	Notes
With project management team	Provide timely decisions on critical issues Manage “scope creep” Secure resources for implementation Remove obstacles	On-going
With critical managers	Enforce readiness accountability for all organizations	On-going
With end users	Be proactive, visible and communicate Communicate key messages Visibly celebrate success stories	On-going

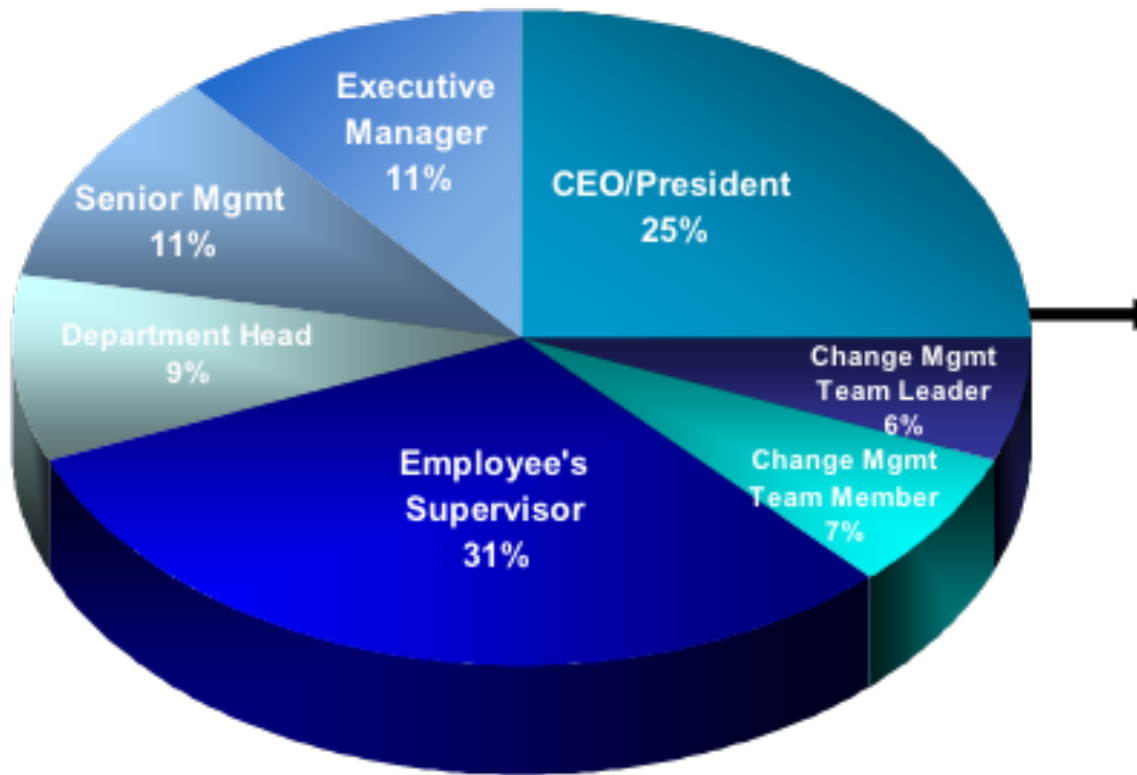


Statewide Organizational Change Management Team Model





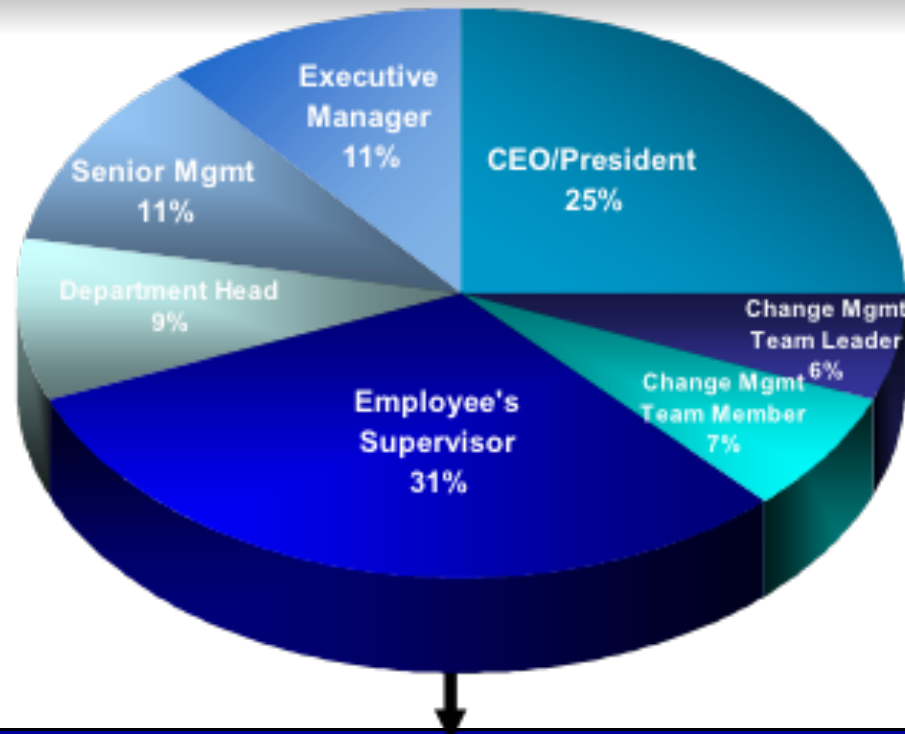
Who Should Deliver the Message?



- The current situation and rationale for the change
- Business issues or drivers that created the need for the change
- Competitive issues or changes in the marketplace
- What might happen if the change is not made
- Vision of the organization after the change is made
- Overall timeframe
- Alignment of the change with business strategy



Who Should Deliver the Message?



- The impact on daily activities
- Why employees want to go along
- Job security
- Specific ways they are expected to aid the change
- Resources for assistance and ways to provide feedback



Organizational Change Phases and Communication

How do I stay motivated?

What is happening?

Transition through Understanding
Analysis through Awareness
Celebrate Success!

Comfort

Insight

Unaware Denial

ty
with
coaching

Desire through What's in it
impacts for me?

Anxiety

How do I prepare?

Knowledge by training

What will I do differently tomorrow?



Information Sheets

- **Understanding**
- **Impacts**
- **Training**
- **Coaching**
- **Count-down to system implementation**



Information Sheets

Awareness Info Sheet

Enterprise Project Management

INFO SHEET

PROJECT SCOPE

DTI is embracing Enterprise Project Management (EPM) to improve our Project Management practice. DTI, teaming with Bogert, will promote a consistent approach for creating, tracking, and managing projects and their information. DTI's solution is a phased-in implementation and will incorporate collaboration tools, focusing on managing project related documents, issues, and risks.

The first iteration includes:

- Technical installation and Configuration of Microsoft Project Server and supporting software and tools.
- Adopt application to DTI Business Processes and Project Templates
- Define project reporting and functional requirements
- Incorporate four to five projects initially
- Perform Microsoft Project skill assessments for Office of Major Projects' Project Managers
- Provide customized training to Project Managers, Team Leaders, and Team Members involved in the initial projects; based on roles, requirements, and skills inventory
- Create Future Iterations Plan (Roadmap), focusing on full deployment of the EPM solution throughout DTI.
- Provide knowledge transfer to DTI Microsoft Project Server Tool Administrators

ACTIVITIES

Assessments	Requirements	Configuration	Deployment	Next Phase – Rollout
People Process Technology	System Process Organization	System Reporting Resource Pool	1 st Iteration Initial Projects Training	<ul style="list-style-type: none"> Develop Future Roadmap Define next steps Strategy Resources Optimum approach for Integrating DTI processes and tools

PROJECT TEAMS

Project Sponsors:

Lynn Hersey-Miller, Chief Program Officer	Provide Strategic Direction
Bill Hickok, Chief Operating Officer	Provide Strategic Direction

Core Project Team:

Name	Role	Responsibility
Pin Narayanan, DTI	Major Project Lead	Project Direction and Acceptance
Kim Cloud, DTI	Project Manager	Manage EPM Deployment
Cindy Bray, DTI	Change Management	Incorporate Change Management Process
Linda Watkins, Bogert	Functional/Technical Lead	Project Management/Functional Consulting Technical Configuration/Training

For more information, contact Cindy Bray (cindy.bray@state.de.us)
March 2008

Coaching Info Sheet

Enterprise Project Management

INFO SHEET

Supervisors as Coaches

Managers/supervisors are uniquely positioned to understand and implement change in their organizations. They are close to day-to-day operations, customers, and frontline employees. Additionally, they are far enough removed from the day to day work to enable them to see the "big picture" and recognize new possibilities for problem solving and growth encouragement.

Supervisors are the preferred method for employees to receive messages about:

- The impact of change on day-to-day activities
- Behaviors and activities expected of employees, including support of the change
- Procedures for getting help and additional information about the change

Supervisors play a key role in obtaining buy-in and commitment from employees.

When it comes to personal issues, receivers want to hear from someone they know and work with regularly, namely their supervisor.

Key messages a Manager/Supervisor should deliver:

- What is really driving the project? What is the problem causing the change?
- What would happen if we didn't change? What will we become through the change?
- How does the project fit-with or grow-out of the past?
- What kinds of secondary change and side effects are likely to occur?
- How could individuals and groups be affected negatively by the change?
- What kind of assistance will we provide to affected individuals and groups?

ACTIVITIES

- Include EPM project as a standing agenda item
- Solicit feedback and input from team members regarding the project and provide this information back to the project team
- Act as the messenger for the project team
- Demonstrate support of the project through words and actions
- Encourage employees to participate in the project by:
 - Attending meetings and training
 - Helping with the testing effort
 - Participating in forums to gather feedback
 - Completing any surveys sent by the Change Management Team
- Review training section of employee's performance plan for upcoming year and encourage them to take ancillary training to complement changes being brought about by the project
- Modify employees' schedules to accommodate learning curve brought about by the new system
- Ask yourself for each employee where their knowledge is lacking and let the Change Management Team know where they need to focus their efforts
 - Awareness for the project
 - Desire for the project
 - Training opportunities
 - Coaching
- Support your employees in embracing the project
 - Post-Implementation

For more information, contact pin.narayanan@state.de.us
May 2008



Communication Board

- **Printed versions of important information**
 - **Newsletters**
 - **Posters**
 - **Fact/Info Sheets**
 - **Bulletins**



Training Plan

- **Identify different audiences that require training**
 - Re-visit End-user Identification Spreadsheet
 - Send to managers and supervisors of end-users
 - Have them rank employees on scale of 1-4 for each specific type of task to be performed in new system
- **Conduct training needs assessment and skill gap analysis**
- **Document requirements for the training team**
 - Training development schedule



Coaching Plan

- **Customized Coaching Plan**
 - Can range from series of coaching info sheets to education for managers/supervisors on how to provide coaching.
- **Prepare managers and supervisors to coach their employees through the change**
 - Identify additional areas of growth for employees i.e. accounting or Excel training for financials implementation.



Transition Ownership to Project Owner

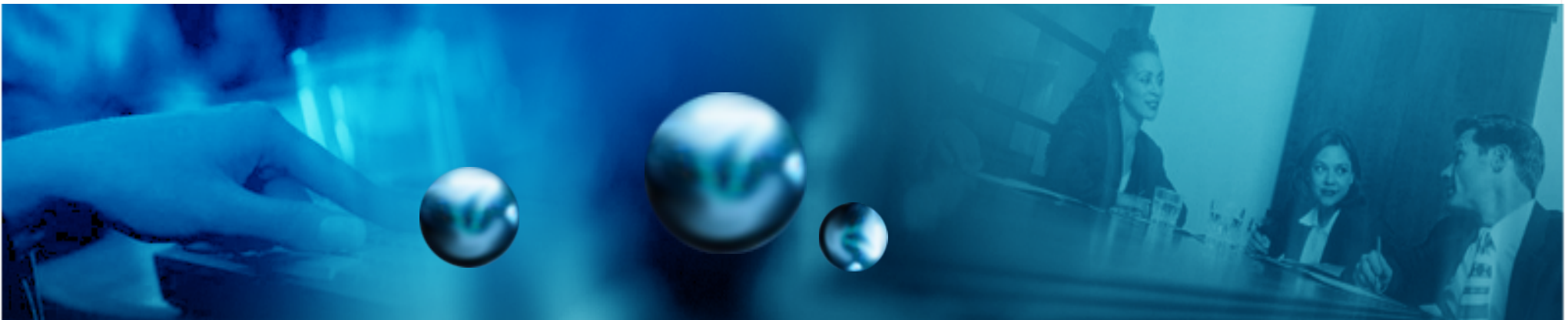
- **Knowledge Transfer Plan**
 - Identifies required skills by project team role.
 - Assesses current skills.
 - Develops an agreed upon action plan and milestones.
 - Re-assesses semi-annually for life of project.



Celebrate

- **Celebration & Recognition!!!**
 - Milestones/successes
 - Implementation success

Department of Technology & Information Organizational Change Management



Metrics



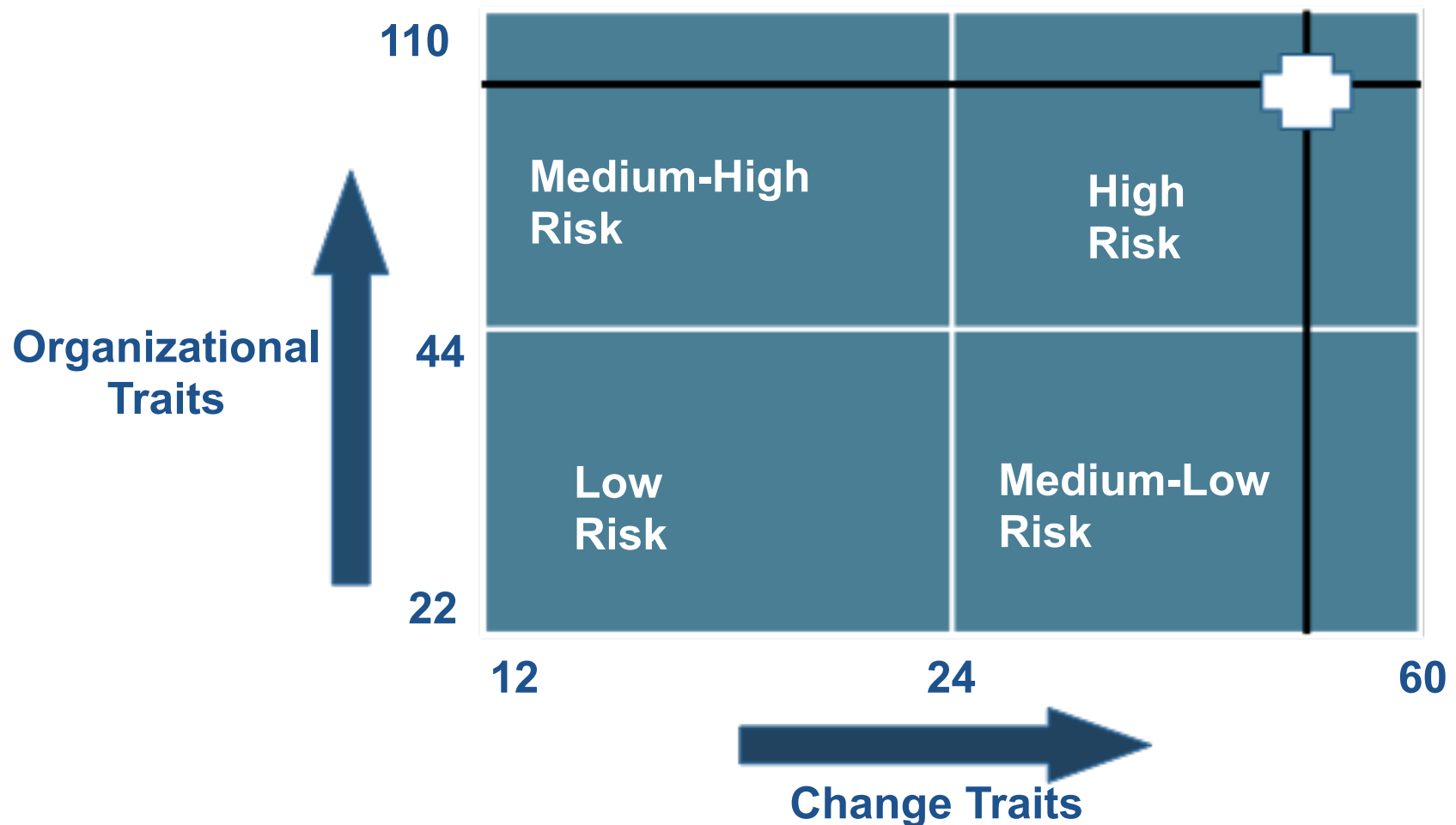
Assessing the Organization

- **Organizational Readiness Assessment**
 - **Organizational Traits**
 - **Change Traits**
- **Plot the project on the Risk Determination Table**
- **Stakeholder Analysis**



Assessing the Organization

Risk Determination Table





Stakeholder Analysis

<p>Important / Little Influence</p> <p>III</p> <p>Developers End-users Web Client</p>	<p>Important / Influential</p> <p>I</p> <p>End-users Fat Client</p>
<p>IV</p> <p>Service Desk Customer Care Center Vendors</p> <p>Not Important / Little Influential</p>	<p>IIII</p> <p>Executive Sponsors Governor</p> <p>Not Important / Influential</p>



End-User Identification & Skills Inventory

- **End-User Inventory**
 - End-User Identification
 - Manager/Supervisor Identification
 - Specify Key-End User
 - Skills Gap Analysis
 - Identify IT Support Personnel and Technical Specifications



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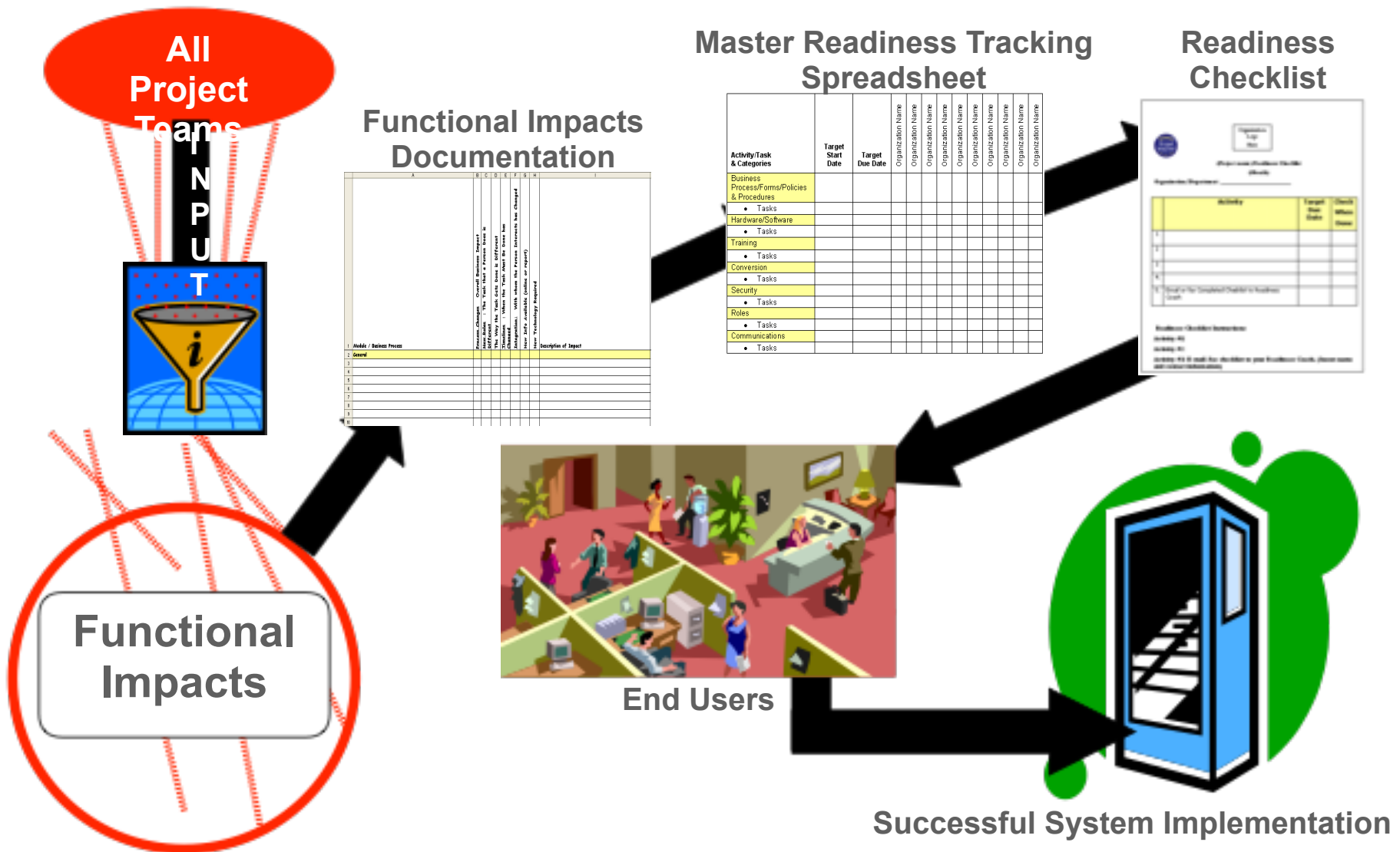


Managing Organizational Change

- **Tracking, Measuring, and Reporting**
 - Functional Impacts Spreadsheet
 - Master Readiness Tracking Spreadsheet
 - Readiness Checklist
 - Checklist Summary
 - On-site Tracking Station
 - Project Status
 - Executive Sponsor Reporting



DTI Readiness Methodology





Functional Impacts

Current Process	Process Changes	Overall Business Impact	New Roles: The Task that a Person Does is Different	The Way the Task Gets Done is Different	Timelines: When the Task Must Be Done has Changed	Integration: With whom the Person Interacts has Changed	New Info Available (online or report)	New Technology Required	Description of Impact - New process	Include in Training Materials	Communicate Business Process Change	Address Security Impacts - Forms, Access, Authorization	Communication to end-users	Use Readiness Methodology to have tasks completed	Date Due	Date Completed	



Master Readiness Tracking Spreadsheet

	Target Due Date	Organization	Organization	Organization	Organization	Organization	Organization	Organization	Organization	Organization	Organization	Organization	Organization	Organization	Organization	Organization	Organization	Organization	Organization	Organization	Organization	Organization	Organization	Organization							
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24		24				
Send in user names and userIDs	07/19/06		✓	✓	✓	X	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	X	X	✓	✓	✓	✓	X	X	18					
			User ID Task for New Castle County 75% complete																												
Register for Training	07/31/06		✓	✓	✓	▲	✓	✓	✓	✓	✓	✓	✓	▲	✓	✓	✓	▲	▲	✓	✓	▲	✓	▲	▲	16					
			Training Registration for New Castle County 66% Complete																												
Had at least one person attend training	08/18/06		✓	X	✓	X	✓	✓	✓	✓	✓	✓	✓	X	✓	✓	✓	X	X	✓	✓	X	✓	X	X	15					
			Had individuals attend training 63%																												
How many attended training			4	X	1	X	2	1	1	1	2	5	2	X	5	2	2	X	X	2	1	X	2	X	X						



Readiness Checklists

September 2006

DTI Team: _____

	Activity	Target Due Date	Check When Done
1	USING THE ATTACHED SPREADSHEET, VERIFY SYSTEMS/APPLICATIONS USED BY YOUR TEAM, THE DATA STEWARD, HOW DATA ON THAT SYSTEM IS CLASSIFIED, WHICH DTI TEAMS USE IT, THE ASSIGNED DATA CLASSIFICATION, AND THE DISASTER RECOVERY CATEGORY THAT HAS BEEN ASSIGNED TO IT.	Sept 30, 2006	
2	USING THE ATTACHED SPREADSHEET IDENTIFY ALL INDIVIDUALS ON YOUR TEAM WHO HANDLE DATA THAT IS CONFIDENTIAL, SECRET, OR TOP SECRET	Sept 30, 2006	
3.	ON THE SPREADSHEET INDICATE IF THESE INDIVIDUALS HAVE THE ABILITY TO SECURE THESE DOCUMENTS	Sept 30, 2006	
4.	IF INDIVIDUALS DO NOT HAVE THE ABILITY TO SECURE THESE DOCUMENTS, PLEASE INDICATE IF YOU WOULD LIKE THE SECURITY OFFICE TO WORK WITH THEM TO ADDRESS THIS CONCERN.	Sept 30, 2006	
	Email Completed Checklist to cindy.bray@state.de.us	Sept 30, 2006	



Executive Sponsor Reporting



Major Project Status Overview – SAMPLE

PHRST ERP Project Implementations Status Overview

PHRST Upgrade	Risk	Comments
On time		
Under Budget		
• eBenefits		
• Recruitment		
• eRecruitment		
Readiness		
Training		

Time & Labor	Risk	Comments
On-time		
Under Budget		
Training		
Readiness		

Risk Color Key	
On Target – no risk	
In Progress – may complete late	
At Risk – needs attention	

Readiness Status Report – SAMPLE



Activity/Task & Categories	Target Start Date	Target Due Date	Org. Name	Org. Name	Org. Name	Org. Name	Org. Name	Org. Name	Org. Name	Org. Name	Org. Name	Org. Name	Org. Name	Org. Name	Org. Name	Org. Name	Org. Name
Monthly Checklists																	
September	9/1/03	9/30/03	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
October	10/1/03	10/31/03	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
November	11/1/03	11/30/03	X			X			X							X	
Other Critical Tasks																	
Leave Survey	8/1/03	9/31/03	X	▲	X	X	▲	X	X	X	X	▲	X	X	▲	X	
Recruitment Survey	9/1/03	10/31/03		▲					▲		▲		▲				



Organization has completed as required



Organization is in process of completing task but will not finish by due date. No risk to readiness



Organization has not started this task and is jeopardizing readiness for this target. No risk to readiness.



Knowledge Transfer Plan

Required Skills by Team Role

PeopleSoft Financials Related Skills					General Project Related Skills	
Skill areas =====> Knowledge Role V	PeopleSoft Process Knowledge	PeopleSoft Configuration	Design & Build Reports, Interfaces, Conversions, Extensions	Site Operations	General Project	Change Management
Functional Configuration	High Medium	Low High	Low Medium	Low Medium	High Medium	Low Low
Technical	Medium	Medium	High	High	Medium	Low
Change Management	NA	NA	NA	NA	Medium	High
Definitions	High =	No supervision required and can lead				
	Medium =	Requires some supervision				
	Low =	Requires routine and direct supervision				
Business Process – Documentation, evaluation, design and build of business processes (State and PeopleSoft processes) within assigned areas of responsibility	High	Able to explain business processes				
	Medium	Able to explain and defend rationale for business process decisions				
		Able to documents current processes, analyze potential process changes and design future processes				
	Low	Able to explain business processes				
		Able to assist documentation and design of future processes with supervision				
	Aware of business processes, able to explain overview					
Configuration – Configuration of the PeopleSoft application	High	Significant experience with one or more PeopleSoft modules and able to lead and teach others to configure PeopleSoft				
	Medium	Able to configure PeopleSoft to support maintenance and future implementations				
	Low	Sufficient understanding to evaluate future enhancements, create functional specifications with supervision				
Reports, Interfaces, Conversions, Extensions – Identification of functional and technical requirements and specification, build/program, and implementation of reports, interfaces, conversions and extensions. (some or all)	High	Able to define/design functional requirements and/or specification for reports interfaces, conversions and extensions				
	Medium	Able to create Technical Specifications				
		Able to support and troubleshoot technical problems in their area (Reports, Interfaces, Conversions or Enhancements)				
		Requires some direction and supervision to define/design functional requirements and/or specification for these activities				
	Low	Requires some direction and supervision to support and troubleshoot technical problems in their area				
		Requires continuous supervision to define/design functional requirements and/or specification for these activities				
Site Operations – Routine activities and management	High	Requires continuous supervision to support and troubleshoot technical problems in their area				
		Can execute PeopleSoft batch scheduling, error handling, security administration, configuration/workbench transports				
		Can respond to helpdesk for phone support, PeopleSoft printers, and GUI installation, upgrade and support				
		Can manage all 3rd party tool administration				



Knowledge Transfer – Action Plan

Section 2 – Action Plan by Role

Provide all planned activities that will help develop the desired level of competency set by the goals above. Use the appropriate tables below and delete unnecessary tables. Additional rows should be added to the tables as needed.

Functional:

Training Course, Activity, Demonstration Opportunity	Instructor / Coach	Target Date	Comment / Demonstration Results



Communication Plan

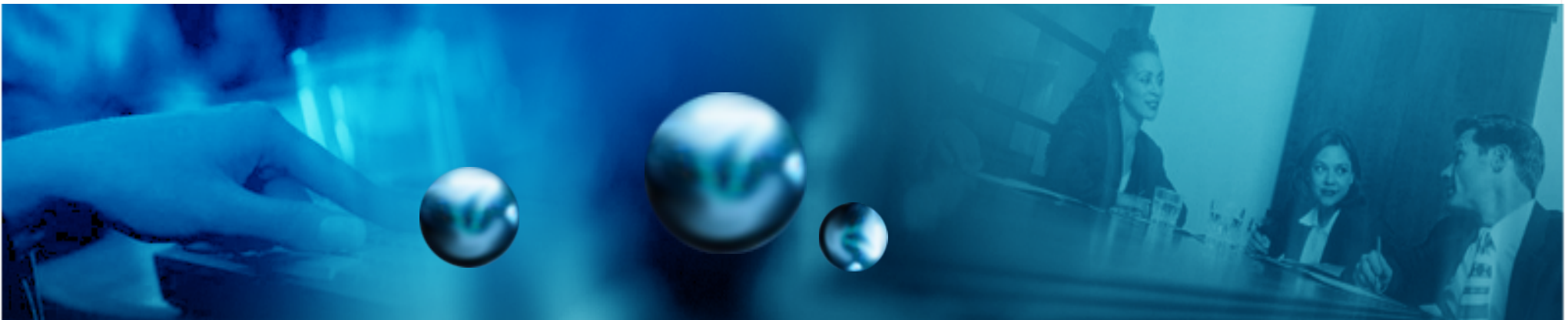
Specific Event	Apr	May	June	July	Audience	Communicator	Release Authority	Status	Comments
<u>Training Evaluation Report</u>	X								
<u>Sponsor Memo</u> – Coaching (Email)		X			End-users	Change Management Specialist	Change Management Team Leader		
Coaching <u>FACT Sheet</u> (coaching Information, email attachment with Sponsor Memo email)		X			End-users	Change Management Specialist	Change Management Team Leader	In Progress	
Coaching Sponsor Memo and FACT sheet <u>Website Update</u>		X			End-users	Change Management Specialist	Change Management Team Leader		
Lessons Learned <u>Document</u>				X	Sponsors	Change Management Specialist	Change Management Specialist		

Communication Plan includes:

- Event
- Scheduled date
- Audience
- Communicator
- Release Authority
- Status
- Comments

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Department of Technology & Information Organizational Change Management



Continuous Improvement



Lessons Learned Board

- **Describes knowledge gained from experience**
- **Captures lessons learned throughout a project lifecycle**
- **Process:**
 - An onsite board is established and divided into the following categories:
 - What we did that we want to do again
 - What we did that we never want to do again
 - What we did not do and should have
 - What we did, worked okay, but could be improved in various ways.
- **Outputs: Lessons Learned Spreadsheet, Lessons Learned section in OCM Closing Report, Project Management updates as required.**

LESSONS LEARNED

WEB-HOSTING
MIGRATION

EMS 11

NOTES
INFRASTRUCTURE
UPGRADE

FILE
EXCHANGE
SERVICE
MIGRATION

PEREGRINE

ENTERPRISE
PROJECT
MANAGEMENT

IDENTITY
ACCESS
MANAGEMENT

ENTERPRISE
ARCHITECTURE

VIRTUAL
ROUTING
AND
FORWARDING

Lessons Learned Board 2006

Lessons Learned describes knowledge gained from experience, successful or otherwise, that is used to improve future performance. Frequently, this is a duty that is regarded as a "nice to have" and not attended to due to the hectic speed of project management. When it is attempted, it is usually after a project is complete, and is subject to differences in observation, interpretation, and recall, meaning that even when lessons learned are captured, the attempt may be flawed.

The Lessons Learned Board is put in place to capture lessons learned throughout a project lifecycle, so when a lesson happens, it is immediately captured while it is fresh in the minds of all participants. Additionally, individuals involved can ensure that they capture the true essence of the lesson. The objective is to ensure that lessons learned during a project are documented and incorporated in the knowledge base for future use.

Process: An onsite board is established at DTI. This board will be divided into the following categories:

- What we did that we want to do **AGAIN**
- What we did that we **NEVER** want to do again
- What we did not do and should have
- What we did, worked okay, but **COULD BE IMPROVED** in various ways.

The Change Management Information Station includes a Tracking Station, Lessons Learned Board, and Information Board for DTI projects. On the Lessons Learned Board, DTI projects included in gathering Lessons Learned are in individual, color-coded boxes with corresponding project titled memo paper. DTI staff is encouraged to jot down the Lesson Learned on the appropriate project memo paper and post in the correct category.

Outputs:

- Lessons Learned Spreadsheet
- Lessons Learned section in Control Book
- Project Management updates as required.

What we did that we want to do **AGAIN**

What we did that we **NEVER WANT** to do again

What we **DID NOT DO** AND SHOULD HAVE

What we did, worked okay, but **COULD BE IMPROVED** in various ways

ENTERPRISE PROJECT MANAGEMENT
An Audit system for licenses should be established so that licenses are given to Active Project Resumes to Avoid Project Resumes to save licensing costs for purchasing additional licenses when it may not be necessary.

FILE EXCHANGE SERVICE MIGRATION
All security ports required by the user Requester should be requested in Advance. The same user should be on Requester to validate that all Annual (Quarterly) use connected for the



Collect, Analyze, and Report Feedback

- **Compliance Audit**
- **Post-Implementation Review Process**
 - **OCM Closing Report**

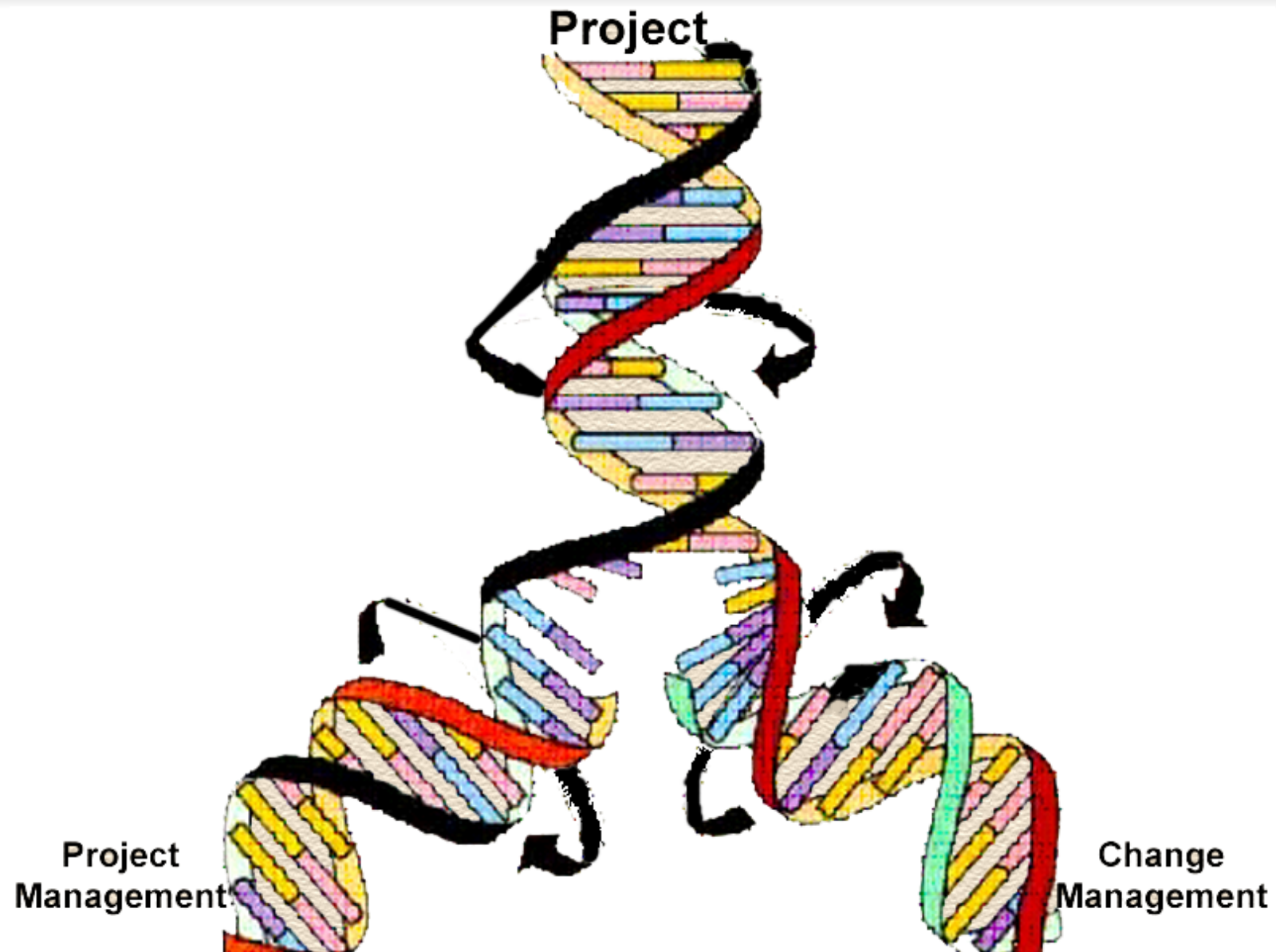


OCM Closing Report

- **System Testing Evaluation**
- **Parallel Testing Evaluation**
- **Training Evaluation**
- **Coaching Survey**
- **Reinforcement/Resistance Survey**
- **Project Evaluation Survey**



Integration is Key





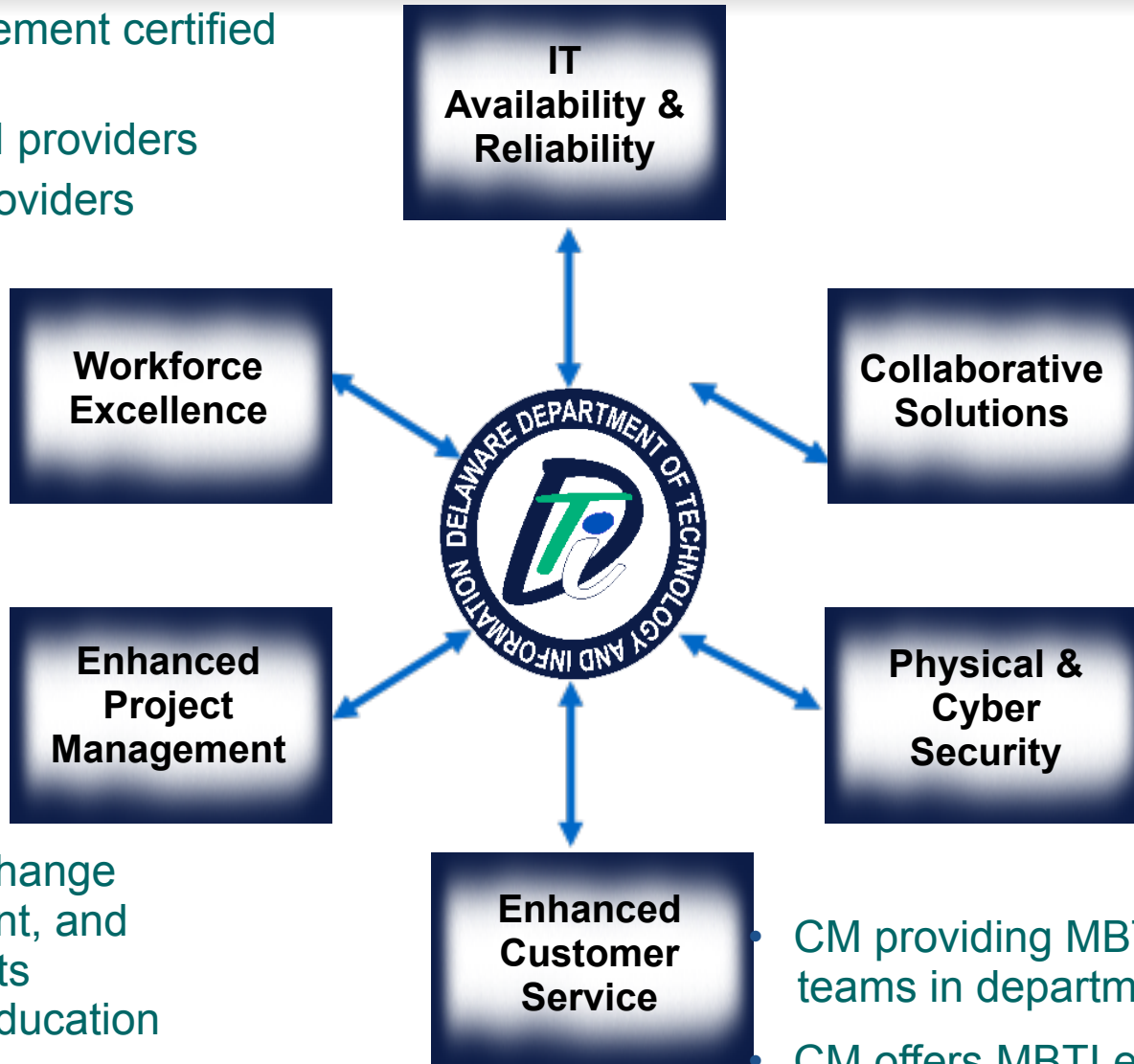
Achieving Successful Organizational Change

- **Dedicate resources to Organizational Change Management.**
- **Secure visible executive sponsorship early in the project.**
- **Repeat key messages early and often.**
- **Involve employees in the change process.**
- **Create a transition strategy with achievable timeframes.**



DTI Strategic Goals & Enterprise Organizational Change Management

- Change Management certified team
- 2 qualified MBTI providers
- 2 qualified EI providers
- Team member pursuing PMI certification
- Team member pursuing BPR certification



- CM partners with or advises many major projects within the state
- CM participating in the EA initiative

- CM participating in DTI security program

- CM providing MBTI education to all teams in department
- CM offers MBTI education to other organizations

- CM offers change management, and requirements gathering education